SURVEYS (ONLINE & INFORMAL)

/ Getting a broad cross-section of inputs from staff and partners /

WHAT IS A SURVEY?

This module offers guidance on conducting **informal** surveys online. These are surveys with respondents that include staff and partners only, and which are used for internal planning and management. This module is **not applicable** for **formal** surveys. Formal surveys include any with beneficiaries (such as children, mothers or families) as respondents, any surveys for the purpose of research, for collection of statistically representative data (for example, on the situation of beneficiaries), for any kind of publication, or as part of formal evaluations. To obtain guidance on formal surveys, consult experts in research design and standards, evaluation, or data and analytics, and adhere to any relevant and applicable organizational guidance on these topics, including ethics procedures

A well-run informal survey can act as a primary source of information for understanding the needs, opinions and experiences of a group of staff and partners; monitoring or assessing their views concerning relevant projects/ initiatives; and informing future planning.

A survey begins with a set of well-formulated questions. Each survey respondent answers the questions independently. Together the responses from all participants make up the survey results, which are analyzed and presented through a report combining text with appropriate visuals.

REQUIREMENTS:

- *Online survey tool (SurveyMonkey, Excel online (part of Office 365), Google Forms, Typeform, etc.)*
- *15 or more respondents*
- *Preparation time: several weeks (time to prepare the survey, then up to 2 weeks for the survey to run, and then time for analysis and presentation of the results)*

WHEN AND WHY TO USE

While there are several ways to administer informal surveys, this article will focus on how to do them **online.** Online informal surveys are easy, quick and cost-effective to run, and can be distributed globally. Online surveys can target a large participant base if needed. They offer participants the advantage of being able to complete the survey at their convenience from any location with internet access:

Online informal surveys are best used:

◢ To understand the needs and practices of a group of staff, or staff and partners, as a basis for effective planning of a project or initiative. Such surveys should be run before the project work begins.

◢ To obtain feedback from participants after an event (such as a workshop and or training session), in order to improve future events.

◢ To elicit opinions and perceptions anonymously from staff and partners on issues where they may feel more comfortable sharing their views confidentially. (With such issues, be sure to frame questions neutrally, inform respondents clearly on how the information will be used and indicate whether or not their response will be kept anonymous. If in doubt, consult a survey expert for guidance.

◢ For on-going project monitoring, to assess how well the project is being implemented, whether it is achieving the desired results, and to gauge the reaction from staff and partners who are implementing, or being affected by, the project.

◢ To help evaluate the impact of an initiative or activity, including knowledge exchange activities.

Any surveys supporting formal research, statistical data collection, evaluation, addressing potentially sensitive issues, or that will be published externally, are outside the scope of this module; instead, consult with the corresponding organizational experts and responsible offices for guidance.[1]
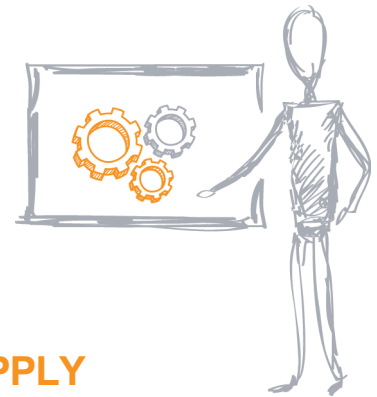
HOW TO APPLY

Planning

1. **Decide whether a survey is the best option.**

◢ What do you want to learn or measure? Surveys are better for collecting information that can easily be categorized or quantified. More qualitative or open-ended information is better collected through other means such as interviews or focus groups.

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[1] For UNICEF staff, the relevant offices to be consulted regarding formal surveys include the Office of Research, the Evaluation Office, and the Data and Analytics Section.

◢ Whom among your organization's staff or partners do you want to reach? How many people? Do they all speak the language that a survey would be conducted in? An online survey can work well with a large number of respondents, who may be geographically dispersed, and who speak a common language.

◢ Are they likely to actually respond to an online survey? This depends on their available time, motivations, etc. While there are things you can do (see 'Steps you can take to increase response rates' below), first you should be confident that you can at least potentially get the attention and participation of the target audience.

◢ Have you recently surveyed the same group? Don't inflict 'survey fatigue' or your response rates will drop.

2. **Having decided on a survey, define the goals and ensure you have a good understanding of the respondents.** This will help in designing the questions.

◢ What do you want to find out? Surveys (and survey questions) typically fall into one of three categories: **exploratory** (building understanding of an issue and gathering insights), **descriptive** (determining opinions and behaviours of the audience, usually quantitatively), or **causal** (clarifying causes and effects).

◢ Who are the end users of the results (e.g. project managers), and how will they use them? Questions should be crafted with a view to generating results that will be useful for end users but should still be objective and should not 'lead' the respondent towards giving certain answers.

◢ Know the respondents. The language of the survey and the type of questions should be tailored to them. Your knowledge of your organization's culture and language usages will be very useful for this.

3. **Choose an online survey tool.** Free public survey tools usually have limitations on numbers of questions or formats, while paid survey tools offer more features; hence your choice of tool can impact your question design (see #4 below). You may have access to organizational survey tools that you can use for internal survey audiences of staff and partners (which are the only audiences considered in this guidance). Consider a survey tool that incorporates a feature showing respondents the percentage of the survey completed as an incentive to finish it. Examples of survey tools include:

◢ **SurveyMonkey:** The free version allows 10 questions, with 15 formats to choose from, and 100 respondents, but without data exports.

◢ **Typeform:** The free version offers unlimited questions and answers, and allows data export and basic reporting.

◢ **Google Forms:** The tool is completely free, allows unlimited surveys and respondents. Data is automatically collected in Google Spreadsheets.

◢ **Excel Online:** This has a survey forms tool which is similar to Google forms. Excel Online is a useful option if your organization uses Microsoft Office.

Design the survey questions

4. **Prepare questions for the survey, keeping in mind the goals, end users and respondents. Once complete, enter them on the online tool for testing.** See Annex 1 below, 'Commonly used question formats'.

a Questions should be short and specific so that respondents can quickly understand what you are asking.

⊿ Keep the language of the questions simple. Avoid lengthy questions, jargon, and potentially ambiguous words.

⊿ Ask one question at a time. Do not use compound questions. For example, do not ask 'What did you think of the event's format and its outcomes?' Instead ask separate questions about the format and the outcomes.

⊿ Do not ask leading questions (i.e. questions which hint at specific responses). For example, do not ask 'Do you agree that this project has been successful?' Instead, ask 'How would you rate the success of this project?' and provide a rating scale.

⊿ Personalise the questions by using the pronoun 'you' in questions (as in 'what do you think of…?'). Use the pronoun 'I' in statements that you ask respondents to rate (as in 'I enjoy the work I do').

b Structure your questions in order to make it easy to interpret the results.

⊿ Make sure the question formats you want are supported by the online survey tool.

⊿ Closed questions (which can be answered yes/no or by choosing from a limited list of choices) are popular for use in surveys, because they provide data that are easy to quantify and analyze. Open questions (which require the respondent to compose an answer) require more work to interpret, and may be best left for use in other methods like interviews.

⊿ Provide consistent answer choices for closed questions: if you decide to use a five-point rating scale for one question, with 5 signifying 'best' or 'strongly agree', then use the same scale for all other similar questions.

⊿ Provide 4 - 5 choices for multiple choice questions. While it may be tempting to offer 6 - 8 choices in order to draw finer distinctions, this risks diluting the data as the responses will be scattered among the many choices.

⊿ Include a few relevant demographic questions to help with interpretation of results. These may include questions on the job function, professional level and geographic location of the respondent.

c Ensure there is a logical flow to the questions:

⊿ Organize the questions into sections by theme.

⊿ Start with simple questions, then move to more substantial ones, and finally return to simple questions to close the survey.

⊿ For anonymous surveys, place demographic questions such as age, marital status, professional level, etc., at the end of the survey. Experience shows that doing so improves response rates.

d As an incentive to respondents, keep the total length of the survey as short as possible.

⊿ For surveys to evaluate events (workshops or trainings), or other simple surveys, 5 - 10 questions (~ 5 minutes to complete) is enough.

▲ For most other surveys, limit the number of questions to about 25 (~ 10 minutes to complete). Exceeding this number may result in declining response rate and/or quality of contributions.

▲ Only exceed 25 questions, or an estimated 10 minutes to complete, when you know your audience well and can expect good response rates despite a long survey. Ensure that respondents can save their answers online and return at a later time to finish.

5. **Test the survey.**

▲ Ask several people to take the survey. Is it easy to understand and answer? Are the responses suitable for the question posed? Can the questions or answers be made more concise? Revise the questions as needed, to ensure that a survey respondent sitting alone at their desk can understand them easily and answer promptly.

▲ Optional: Another way to test the survey is via a meeting with five people who fit the profile of the survey's target audience. Read and discuss the questions and available answers one by one, and look for problems or ways to improve.

▲ Using results from these tests, confirm that the kind of data the survey will provide is useful, and is in the format you need.

▲ Confirm how long the survey takes to complete, and include this information in the introductory message that opens the survey.

6. **Prepare an introductory message to be placed on the first survey page.** Include who is running the survey, the goals of the survey, how the results will be used, how long it will take to complete, and the deadline or closing date.

Run the survey

7. **Launch the survey** when your target audience (of staff and partners) is most responsive; avoid holidays and periods of low activity. Email the survey link to the members of your target audience; if possible, have the message sent out by a senior manager, in order to increase response rates.[2] If the survey covers multiple offices or functional areas you might ask senior leaders in those areas to resend the message to their location or thematic group.

▲ If you cannot identify specific members of a target audience, you can post the survey link with an appropriate message on a website, intranet site, community site, etc.

▲ Optional: To increase response rates, you can send a reminder a few days before closing the survey. If your survey is non-anonymous and targets only a limited number of respondents, then you can direct the email only to those who have not yet completed it.

▲ For feedback surveys on meetings and events, launch them as soon as possible after the event, or even during the event itself, and set a relatively short deadline for response. (For more on evaluating meetings, see 'Real-Time Evaluation Tools for Meetings and Workshops' in this Toolbox.)

8. **Monitor the response while the survey is**

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[2] Alternatively, if your survey is not anonymous, you can also enter respondents' email addresses into a survey tool like SurveyMonkey which can send individual invitations.

running, typically for one to two weeks. If response rates are low, you might find that you need to extend the deadline, so factor this into your planning.

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Analyse and report on the survey

9. **Analyse the results (which are compiled for you by the online tool) and prepare a report.** The report should include:

a **An introduction** outlining the goals of the survey, the target audience/respondents, and briefly describing how the survey was carried out. Be sure to mention the informal nature of the survey.

b **The survey questions** (including response choices for multiple choice questions).

c **An analysis,** including data tables and charts to make it easier for readers to understand the results. This is the most important part of the report.

◢ In the analysis, remember to compare responses for different demographic groups, e.g., from different regions, functions, age groups, etc.

◢ Look for the "stories" in the data, i.e. where something in the results conveys a clear message (such as a frequent complaint), is striking, or perhaps is unexpected.

◢ Although the survey package may have tools for data analysis and visualization, it is often best to use the tool to do the analysis but then export or copy the key charts into another package to present the results clearly and attractively.

◢ State key results and findings both in text and using charts.

◢ If your survey included open questions, consider categorizing the responses (e.g. 'favourable', 'neutral', 'unfavourable'). This will require careful review of answer text.

◢ Consider the response rate when doing the analysis: Surveys with very low response rate (e.g. less than 15%) may not be representative of the group surveyed. If you have a very low response rate, you may wish to consider rerunning the survey at a later date if time allows. If not, then be prepared to take the findings with a pinch of salt.

d Optional: The complete survey results. If your survey included open questions, then the results may be lengthy.

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10. **Share the report with the end users, help them interpret the results and support them in deciding on recommended actions in response to what has been learned.** Also consider presenting the results via a Webinar or Lightning Talk, or using them as inputs into a face-to-face knowledge exchange process such as a World Café, an E-discussion, a Retrospect or another relevant process. It is also good practice to share the results with the respondents and let them know what plans or actions have been undertaken in consequence.

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TIPS FOR SUCCESS

Writing effective questions

◢ One way to write strong questions is to brainstorm questions around the theme or focus of the survey. Formulate as many as you can, both closed questions and open questions. Next, transform the open questions into closed ones – e.g. change 'How do you share knowledge?' into 'Which of these approaches do you use for sharing knowledge?' (plus a list of likely approaches). Then take the original closed questions and turn them into open ones – e.g. change 'Which of the following are your reasons for participating in communities of practice?' into 'Why do you use communities of practice?' The idea is to see each question from different perspectives, to allow you to pick the best approach overall. Pick the best of the questions you create and use them in your survey.

◢ See also Annex 1 below, 'Commonly Used Question Formats'.

Response rates

◢ Response rates for online surveys vary and can sometimes be quite low. Internal surveys (i.e., targeting an organization's own staff) can achieve rates of up to 30-40% or even more. Reasons may include a sense of obligation by staff to respond, or that it is considerably easier to design effective surveys for familiar audiences, such as work colleagues.

◢ **Steps you can take to increase response rates:**

- Let respondents know, in the survey email and in the introductory message at the beginning of the survey, about the value of their feedback and how the results will be used. This will help them recognize that the time they spend to complete the survey is meaningful.

- Keep the survey short and focused. Eliminate any questions that don't help meet survey goals.

- Test the survey with representative respondents, and modify it based on their feedback.

- Send out multiple reminders.

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Annex 1: Commonly used question formats

Question format	Description	Use for
Closed multiple choice questions, single answer only	Several concise answers are provided; respondents choose only one answer.	Questions with several mutually exclusive answers. These kinds of questions can facilitate analysis by providing clear, unambiguous differentiation.
Closed multiple choice questions, multiple answer	Several concise answers are provided; respondents can choose more than one answer.	Questions with answers that can be valid at the same time. These kinds of questions capture a broader range of data but can lead to results that are harder to analyse.
Open questions	Answers are free-form text (possibly with limits such as maximum character count).	Questions with answers that cannot be predetermined, or that require richer inputs from respondents. Use sparingly since these responses cannot be analyzed quantitatively. Perhaps best suited for small targeted groups of respondents.
Ranking questions	Respondents are asked to rank several pre-determined responses in order (of importance, priority, preference, etc.).	Evaluating a set of choices against one another. Turning subjective preferences into quantitative data.
Dichotomous questions	Answer are binary: either True or False, Yes or No.	For helping subdivide the results into relevant categories. Use sparingly as these questions are limiting.
Numeric questions	Answers are continuous variables like age, number of years, etc.	Obtaining demographic information and identifying subgroups among the respondents.