



# Activity 3.1: Survey Administration Training

## Materials Needed

Paper  
Writing Utensils  
Copies of the final survey (see Tool 3.1 for sample template)  
Copies of rap for your survey outreach (see Tool 3.2 for sample)  
List of “Key Terms” in your survey (see Tool 3.3)

## Key Terms

Survey  
Sample  
Respondent  
Rap

## Intended Audience

Community members that will be conducting surveys

## Time Needed

2.5 hours

## Purpose of Activity

To make participants familiar with the survey instrument being used for your research project and to train surveyors on how to conduct the surveys.

## By the end of Activity Participants will

- Understand how the survey fits in to the larger campaign
- Be familiar with research terms related to surveying
- Be familiar with the Survey instrument
- Understand all the key terms in the survey
- Understand who should be targeted to take the survey

## Before this Activity Participants Will Need to

Have finalized the survey instrument

## Part I: “Why are we doing this survey?” (15 minutes)

### Facilitator Instructions

1. Ask a volunteer who’s been consistently involved in the research project to describe the research project and how it fits into your organizing campaign.
2. Introduce how the survey fits into your research project.
3. Popcorn questions about how the survey is connected to organizing.

## Part II: “Who are we targeting?” (15 minutes)

1. Review the terms “sample” and “respondent” with members.
2. Review the sample group you are targeting and get specific. What is the background of the core group that you are targeting? Why are we targeting this particular group of people? How do we know they have the information we need to collect? Discuss any issues that arise.
3. Discuss who you are NOT targeting and how to make sure you are surveying the right people.
4. Discuss what to do if surveyors approach someone that is not eligible for the survey. How do you make sure to still try to connect these people to your organizing work?



## Part III: How To Approach People to Survey (20 minutes)

1. Handout copies of “the Rap” you have created for your surveyors.
2. Explain what a rap is: a script that you use to approach potential survey respondents. The rap should introduce yourself, your organization and why you are doing the survey. Read it through once as a group and answer any questions.
3. Have participants role play the rap in partners
4. Debrief
5. Discuss any issues that need special attention in doing outreach for the survey (confidentiality, discussing sensitive issues, etc.)

## Part IV: Getting Familiar with the Survey (40 minutes)

1. Before the meeting, prepare a list of key terms that show up frequently in the survey that are specific to your campaign.
2. Give each participant a handout that includes:
  - a. The list of key terms
  - b. A copy of the survey
  - c. The “tips for surveying” handout (see Tool 3.3)
3. Go over the list of key terms with members, clarify any questions that arise.
4. Walk through the survey with the group and discuss how to use each part of it.
5. Next go over the general tips for surveying.

## Part V: Test the Survey (45 minutes)

1. Break out in pairs and survey each other.
2. Come back to the big group to debrief and discuss the questions that are tricky.
  - a. Are there any questions that seemed hard to understand or explain?
  - b. Are there any words that are confusing or hard to read?
  - c. Are there directions in the survey that are confusing?
3. 3. Troubleshoot—brainstorm how to address some of the issues that came up.

## Part VI: Wrap up check out (10 minutes)

1. Discuss questions, and concerns that came up throughout the day’s activity.
2. Discuss next steps in conducting survey outreach.