

Research for Organizing Webinar Series Module 4: Creating, Designing and Implementing Surveys – Quantitative Data

Presenters

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Agenda

- Logistics
- Who we are
- Past Modules
- Survey Design
- Sampling Strategy + Outreach Plan
- Survey Collection
- Q&A



Webinar Logistics

<u>Audio Options:</u>

- Listen by phone:

- Select "telephone" in the audio option on the control panel.
- <u>Call</u> the number sent to you in registration confirmation
- Enter your access code
- Enter your <u>audio pin (press # [code numbers]#</u>) so we can identify you.
 - Pin will be shown on your screen when you log in online.

- Or, listen through your computer's audio.

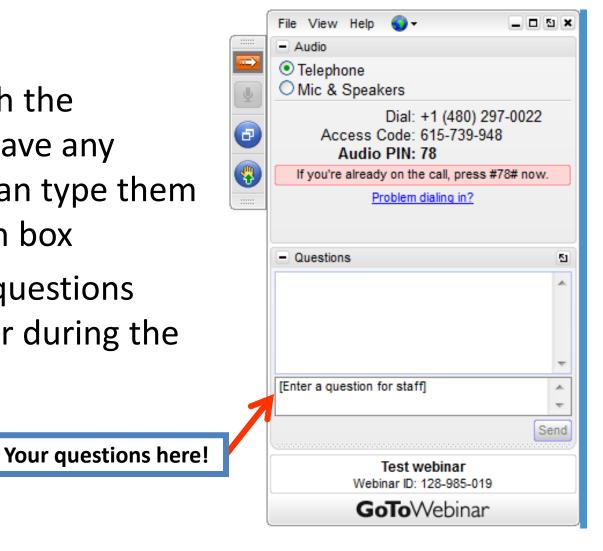
Everyone but the presenters will be muted to reduce background noise.



Webinar Logistics

Questions

- As we go through the webinar, if you have any questions, you can type them into the question box
- We will answer questions after the webinar during the Q&A session





INTRODUCTION TO THE COMMUNITY DEVELOPMENT PROJECT (CDP)

Who is CDP?

- Strengthen impact of grassroots organizations, through...
 - Participatory Action Research Reports
 - Grassroots Policymaking
 - Popular-Education Curriculum Design and Research Training
 - Strategic Campaign Research



CDP Partnership Model

- Prioritize working with groups that...
 - Are based in low-income/excluded communities in New York City
 - Conduct community organizing campaigns with a goal of achieving systemic change
 - Are membership-based, member-led
 - Engage in leadership development and basebuilding activities



POLL:

Have you previously attended or watched a recording of a Research for Organizing Webinar?



Research For Organizing Webinar Series

- Module 1: Unpacking the Toolkit
- Module 2: Designing your Research Project
- Module 3: Overview of Research Methods
- <u>Module 4: Creating, designing, and</u> <u>implementing Surveys – Quantitative Data</u>



MODULE 4: CREATING, DESIGNING AND IMPLEMENTING SURVEYS – QUANTITATIVE DATA

Objectives for this Module

- Participants will be able to...
 - Understand the steps involved in survey design and collection
 - Understand the role community and organizational members can play in survey design and collection
 - Understand how surveys can connect to organizing efforts
 - Understand the role of sampling strategies and outreach plans in survey collection



INTRODUCTION TO PARTICIPATORY ACTION RESEARCH (PAR)

Participatory Action Research (PAR)

- Community-driven
- Power-building
- Action oriented







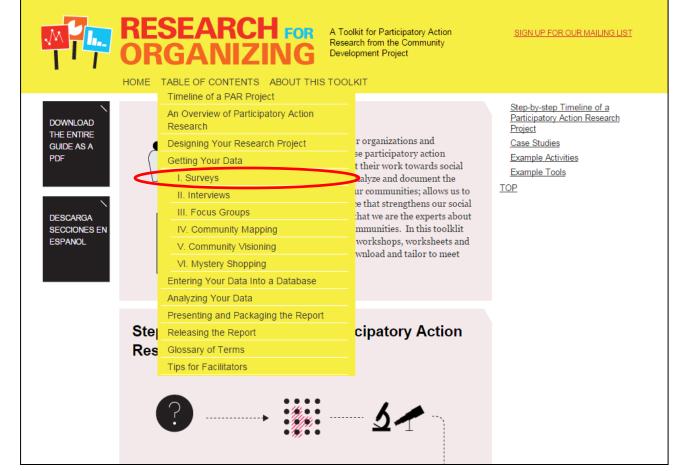
RESEARCH FOR ORGANIZING (RFO) TOOLKIT

Research for Organizing Toolkit

- Designed for organizations and individuals using PAR in social justice work
- Compiled from years of working with grassroots organizations
- Trainings, tools and tips created for organizers & community members to become more actively involved in research process



Research for Organizing Toolkit





www.researchfororganizing.org

INTRODUCTION TO SURVEYS



Surveys

- Ask specific close-ended questions
- Tend to include yes/no, multiple choice, and/or short answer questions
- Generate quantitative data



Survey Questions vs. Interview and Focus Group Questions

Survey Question:

Have you experienced any of the following because you didn't have carfare? (Check all that apply)

- Missed a methadone dose
- Used heroin
- Used street methadone
- Used other pills
- □ Other (Please specify):

Focus Group & Interview Questions:

- What are the two best things about your methadone clinic and what the two biggest concerns that come to mind when you think about your methadone clinic?
- Tell me about your experience with a syringe exchange program?



Surveys - Benefits

- Multiple ways to administer in-person, over the phone, online, through the mail
- Generates quantitative information/data from a large group of people
- Helps support policy demands elected officials, policymakers and media often want to see numbers



Surveys – Challenges

- Hard to collect data about experiences or feelings
- Requires attention to detail in designing instrument
- Need a solid outreach plan
- **Analyzing** survey data—this may require support from a research partner



Research for Organizing - Surveys



A Toolkit for Participatory Action Research from the Community Development Project

HOME TABLE OF CONTENTS ABOUT THIS TOOLKIT

GETTING YOUR DATA: SURVEYS

DOWNLOAD ACTIVITY 3.1

Activity: 3.1 Survey Administration Training

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

Materials Needed:

Paper

3. Getting Your Data: Surveys

SIGN UP FOR OUR MAILING LIST

Activities Survey Administration Training

Tools

Survey Template

Sample Rap for Surveying

Tips for Conducting Surveys

Needs Assessment Survey Template

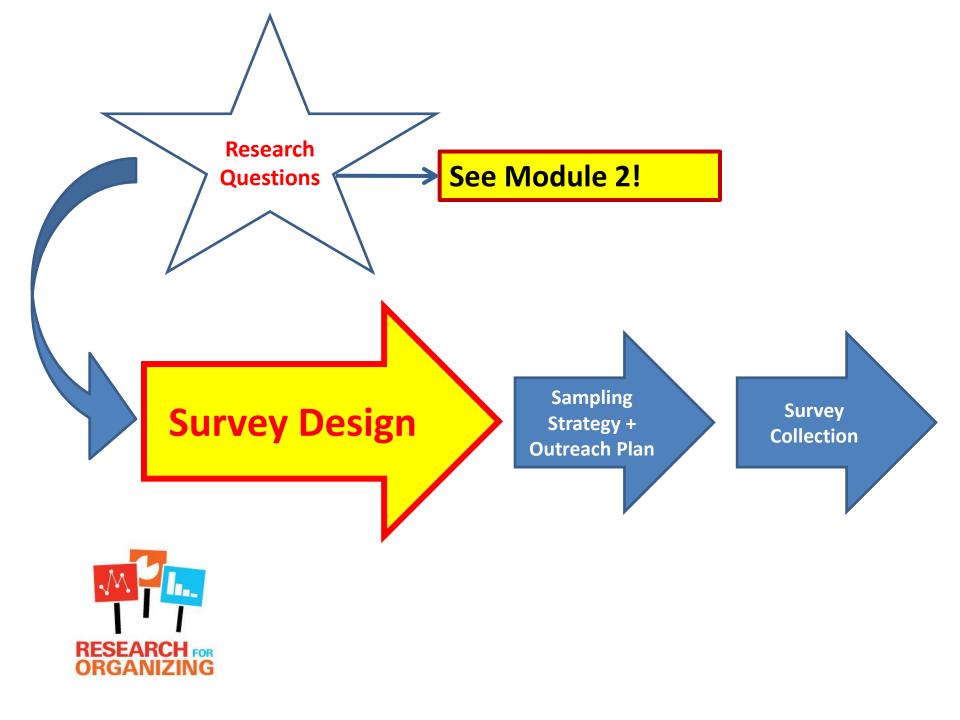
Case Studies

Domestic Workers United and CDP's Report: Domestic Workers and Collective Bargaining

New Settlement's Community Action for Safe Apartments (CASA) Report: Tipping the Scales in Bronx Housing Court

TOP





How do you involve members in survey design?

 Research team of members can give input on survey and any other research steps

 Members can provide feedback on questions and answer choices

CRAFTING SURVEY QUESTIONS



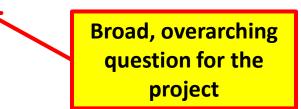
Getting Started

- Start with research questions
 - Which research questions can best be explored by a survey?
 - Identify broad categories of questions
 - Develop survey questions based on categories
 - If other organizations or academic studies have done surveys on similar topics or categories, good to use questions from those surveys if they apply



Research Questions vs. Survey Questions

What works, what doesn't work and what is missing in terms of language access policies and procedures for Limited English Proficiency (LEP) public housing residents?



Specific questions asked	10) In the past 3 years, was there a time that you needed a translated version of a NYCHA document (like		
to respondents	hearing notice or a lease)? O Yes		O No
	(If "yes" ask question 11, if "no" skip to question 16)		
	11) Did you ask someone who works for NYCHA for that document translated in your language?		
	OYes	ONo	OI didn't know I could ask NYCHA for translation
	(If "yes" ask question 12, if "no" or "I didn't know" ask question 13)		
	12) Did you receive the document from NYCHA in your language?		
		O Yes	O No
	13) Did you ask someone who <u>does not</u> work for NYCHA to translate the document(s) for you?		
	O Yes		O No
	(If "yes" ask question 14, if "no" skip to question 16)		

Identifying Categories of Questions

What are the biggest issues and needs facing Asian residents in public housing?

- What is the experience of Asian residents with public housing staff and management? With maintenance and repairs process?
- What works, what doesn't work and what is missing in terms of language access policies and procedures for Limited English Proficiency (LEP) public housing residents?
- What is experience of Asian residents with community safety?

Experiences With Public Housing

Language Access

Experiences with Police

RESEARCH FOR ORGANIZING

Crafting Good Survey Questions

- Avoid vague questions
 - Ex: "Do you work out regularly?" vs. "How many days per month do you work out?"
- Limit time periods when asking questions about the past
 - Ex: Have you received overtime pay?
 - Rather: In the past 3 months, did you receive overtime pay?
- Where possible, **define unfamiliar terms** that appear in questions/answers within the survey



Crafting Good Survey Questions

- Avoid leading questions
 - Ex: How short was Napoleon? Vs. What would you estimate Napoleon's height to be?
- Avoid asking "double barrel" questions
 - Ex: What is the most affordable and appealing in this list of products?
 - Rather:
 - 1. What is the most affordable in this list of products?
 - 2. What is the most appealing in this list of products?



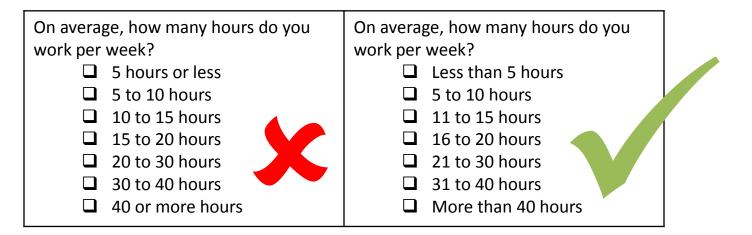
Crafting Good Answer Choices

- When asking "yes/no" questions, also offer "I don't know" as an option
- "Other" option choice should say "please specify"
- Having a "choose not to respond" option matter of preference



Crafting Good Answer Choices

- When applicable, specify if respondents should select only one answer choice or can select all answer choices that apply
- Opt for ranges/check boxes over write-ins whenever possible
- Be sure that answer option categories **don't overlap**



Pop Quiz!

Are these good survey questions?



How many times have you taken the subway?



How disappointed are you about newly announced MetroCard fare increases?



Which do you think is most beneficial and necessary for the neighborhood?

- More retail stores
- A new high school
- More recreational centers
- More fresh food options



What is the estimated yearly income of your household?

- **Under** \$10,000
- □ \$10,000 \$14,999
- □ \$15,000 \$24,999
- □ \$25,000 \$34,999
- **\\$** \$35,000 \$49,999
- □ \$50,000 or more



Asking Demographics Questions

- Helps us better understand who we have surveyed
- Allows us to look for any patterns in how different communities are impacted by the issue being studied
- See <u>Tool 3.19: Sample Demographics Survey</u> <u>Questions</u>



Tool 3.19: Sample Demographics Questions



Race and Ethnicity Questions

While data about race and ethnicity can give valuable information about our communities, it is important to be thoughtful and intentional about how questions of race and identity are asked. These questions may be sensitive or complicated for respondents, and can potentially replicate oppressive power dynamics. We should be mindful that respondents may not want to self-identify and/or may have questions about how data from these questions will be used.

6) How would you identify your race/ethnicity (check all that apply)?

- □ White
- Black
- Latino (any race)
- Asian or Pacific Islander
- □ Native American
- □ White
- Other (Please specify): ______

7) What is your country of birth?

- United States
- Other (Please specify): ______
- 8) Which country or countries are you a citizen of? Check all that apply.
 - United States
 - Other (Please specify): ______
- 9) What is the language you are most comfortable speaking?43
 - □ Cantonese
 - English
 - □ French
 - Guyanese
 - Indian Languages (Hindi, Bengali, etc)
 - 🗌 Italian
 - Mandarin
 - Russian
 - Spanish
 - Other Please specify): _

MESEARCH.

Federal Poverty Level/Self-Sufficiency Standard

Using the location and household information, the Self-Sufficiency standard⁶ calculates how much household income is needed for the family to support themselves, which can be compared to the reported household income (question 17). This is a more robust measure of poverty and need than the federal poverty level (FPL)⁷. In order to compare to the Self-Sufficiency standard, the survey needs to include all the following questions, plus questions 3 in the previous section. Only the information from questions 10 12, and 13 are needed to compare to the federal poverty level, since that is calculated simply based on the number of household members.

10) What is your household's estimated yearly income?⁸

- Less than \$10,000
- □ \$10,000 to \$14,999
- □ \$15,000 to \$24,999
- □ \$25,000 to \$34,999
- □ \$35,000 to \$49,999
- □ \$50,000 to \$74,999
- □ \$75,000 to \$99,999
- □ \$100,000 to \$149,999
- □ \$150,000 to \$199,999
- □ \$200,000 or more

11) How many working adults (over 18) are in your household?

12) How many total adults (over 18) live in your household? _____

13) How many total children (under 18) live in your household?

14) What are the ages of the children in your household?

- □ Age of Child 1
- □ Age of Child 2
- □ Age of Child 3
- □ Age of Child 4
- Age of Child 5
- Age of Child 6

15) Do you have health insurance coverage?

- Yes
- □ No

DESIGNING SURVEY LAYOUT



Administering Surveys

- Interview style vs. self-administered
- Paper vs. electronic surveys



Using Technology – Electronic Surveys

Benefits

- Able to distribute to a large group of people if emailed out
- Don't need to do data entry analyzing data is faster
- Has the potential to facilitate language access

Challenges

- Less ability to connect with respondents for organizing efforts if emailing surveys out
- Might lose respondents who can't use technology/make respondents who don't usually use technology uneasy



The Building Blocks of a Survey

- Surveyor Use Only Section
- Survey Introduction
- Anonymity/Confidentiality
- Instructions for Survey Administration
- Screening Questions
- Categories of Questions
- Demographic Questions
- Office use only section *more in future module*!

See <u>Tool 3.22 – Survey Building Blocks</u>

Surveyor Use Only Box

- Track who is completing surveys
- If some answers are hard to read when entering data, can ask surveyor for clarification
- Allows analysis by survey site

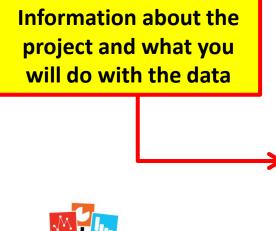
SURVEYOR USE ONLY	
Surveyor Name:	
Date of Survey:	
Survey Site:	



Survey Introduction

"This survey is being conducted by CAAAV: Organizing Asian Communities. CAAAV is a pan-Asian community organization that works to build the power of low-income Asian immigrants and refugees in New York City."

Introduction to the organization



"This survey allows us to learn more about the experiences of Asian public housing residents, and will be used to write a report about Asians in public housing, which will include recommended changes for public housing."



Protecting Respondents

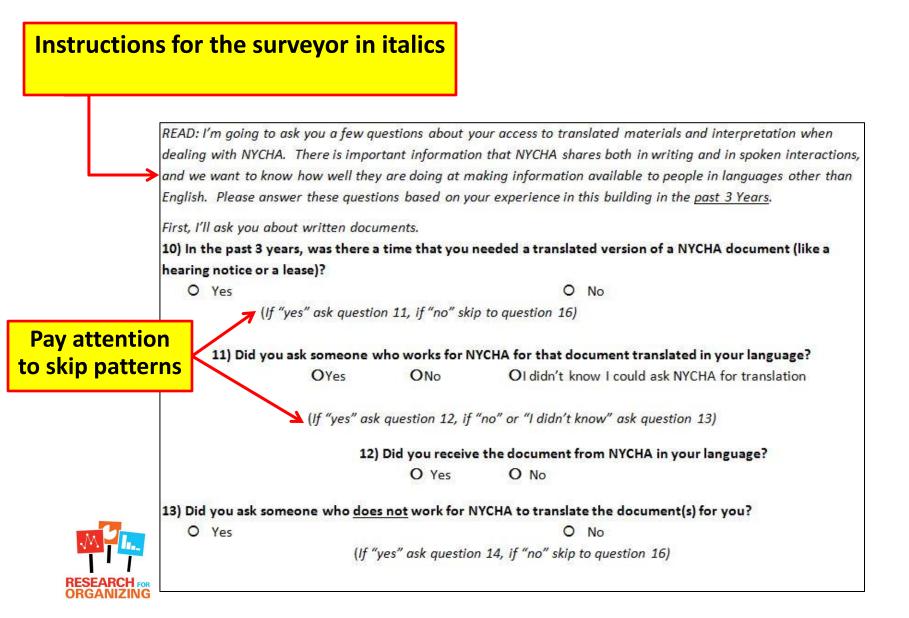
Confidentiality

"This survey is confidential and anonymous. Your name and contact information will not appear anywhere on the survey. We encourage you to answer every question to the best of your ability. However, if you do not feel comfortable answering a question, feel free to skip it. Your input is very important."

- Make clear to respondents whether responses are anonymous and/or confidential
- Be particularly careful asking questions to vulnerable populations
 - i.e: undocumented immigrants, formerly incarcerated individuals, survivors of domestic violence



Instructions for Survey Administration



Office Use Only Section

- If you have paper surveys, will need to enter into a database
- Office use only keeps track of who is doing the data entry

FOR OFFICE USE ONLY (COMPLETED BY PERSON DOING DATA ENTRY)

Survey Number:

Language of Survey: _

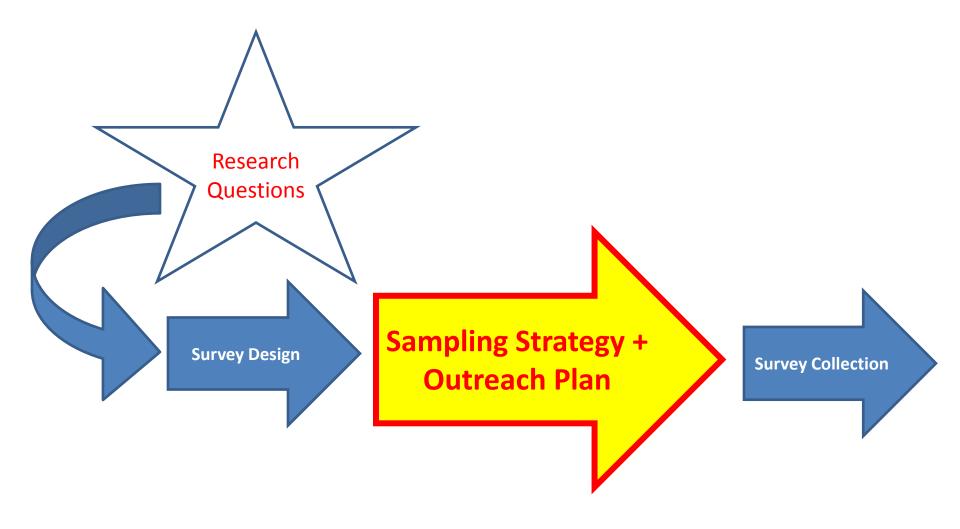
Name of Person Entering Survey:



Piloting Your Survey

- Test survey to check for
 - Timing
 - Questions/answer choices that might be confusing or difficult to answer
 - Questions/answer choices that might make respondents nervous
 - Clarity in survey directions







What is a Survey Sample?

• The universe of people that you are targeting for your survey is your **survey sample**.

 You should determine your sample BEFORE you start surveying and come up with a strategy.

Choosing a Sampling Strategy

Most common sampling strategies we use in PAR:

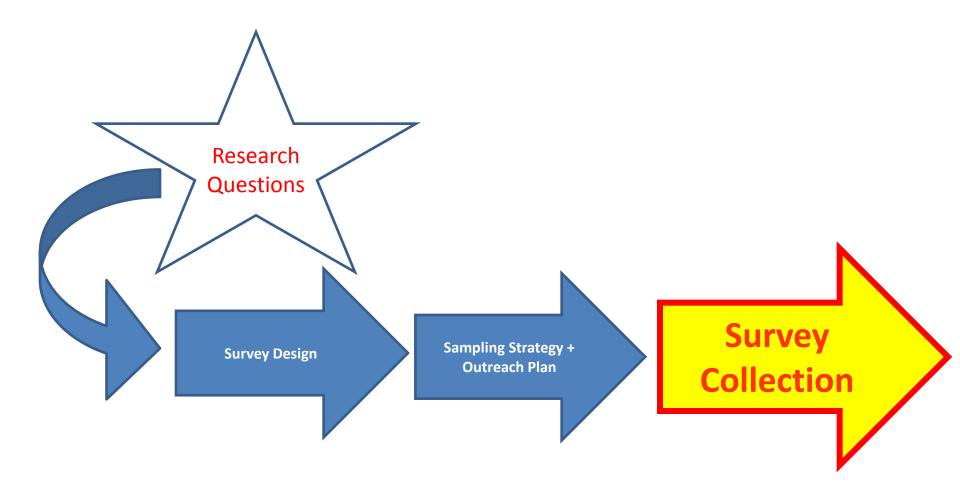
- **Purposive sample** when you target a specific community for a specific purpose.
- Snowball sample when you ask a respondent to suggest others who might be a good fit for your research.

Building Screening Questions into the Survey

Screening Questions		
READ: First I'm going to ask ye	ou a few questions to be sure you are eligible to complete the survey.	
3) Do you live in public housing?		
O Yes	O No	
If respondent answered "no" to any	of these questions, READ: "Based on your answers, you are not in the target	
group for our survey, and you do no	t need to fill out the remainder of the survey. We thank you for your time."	
Ho	and respondent information about CAAAV.	

Outreach Plans

- Target locations for survey collection
 - Where can you meet the people most affected by the issue you are researching?
- Timely collection of surveys
 - If your goal is to collect X surveys over the summer, what are your daily/weekly/monthly goals for surveyors?





Using Survey Collection as an Organizing Tool

- Leadership development opportunity for member leaders
- Public Education: Members can educate their neighbors and learn more about the issue they are researching as they survey.
- Membership recruitment: Can use surveying to recruit new members to your org

Activity 3.1: Survey Administration Training

DOWNLOAD ACTIVITY 3.1

Activity: 3.1 Survey Administration Training

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

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)

Activity 3.1: Survey Administration Training

ORGANIZING

3. Getting Your Data: Surveys

Activities

Survey Administration Training

Tools

Survey Template Sample Rap for Surveying Tips for Conducting Surveys Needs Assessment Survey Template

Case Studies

Domestic Workers United and CDP's Report: Domestic Workers and Collective Bargaining

New Settlement's Community Action for Safe Apartments (CASA) Report: Tipping the Scales in Bronx Housing Court

TOP



Developing a Survey Rap

- Script used to approach potential survey respondents
- Introduces you, the organization and survey purpose



Tool 3.2 Sample Rap for Surveying

DOWNLOAD TOOL 3.2

Tool: 3.2 Sample Rap for Surveying

From Domestic Workers United Study:

Hi, my name is ______ and I'm with Domestic Workers United. We are a group of domestic workers including nannies, housekeepers and elderly caregivers fighting for more rights and better working conditions. Are you a domestic worker (or nanny, housekeeper or elderly caregiver?)

If No...probe a little to find out what they do and if they are not a domestic worker (hand them literature about DWU and thank them for their time)

If they are a domestic worker SAY...

You may have heard about the recent law that just passed that gives more protections to domestic workers like a day of rest and the right to overtime pay. Have you heard about it? (Briefly explain)

We are doing a brief survey today because we think there is more that can be done to make sure that we have more rights and better working conditions. We are going to write a report based on this survey to educate people about domestic workers and our industry. Do you have some time to answer a few questions about your work as a domestic worker? It should just take a few minutes.

Go into survey...



3. Getting Your Data: Surveys

Activities

Survey Administration Training

Tools

Survey Template

Sample Rap for Surveying

Tips for Conducting Surveys

Needs Assessment Survey Template

Case Studies

Domestic Workers United and CDP's Report: Domestic Workers and Collective Bargaining

New Settlement's Community Action for Safe Apartments (CASA) Report: Tipping the Scales in Bronx Housing Court

TOP



Tool 3.2 Sample Rap for Surveying

Tool 3.3: Tips for Conducting Surveys

DOWNLOAD TOOL 3.3

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3.3 EN

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Tool: 3.3 Tips for Conducting Surveys

General Surveying Tips:

- 1. Make sure you fill out the information at the top of the survey (your name, site of survey, date, etc.).
- 2. Ask questions and give answer options word for word as they are written.
- 3. Ask questions in the order they appear in the survey.
- 4. Ask every question, unless the directions say to skip it.
- 5. Write down responses immediately after they are given.
- 6. Clearly mark your answers.

Tips for Using Your Surveys as an Organizing Tool:

Surveying can be a useful tool to strengthen your community organizing and outreach efforts because it enables your organization to meet and discuss with new community members who might be interested in joining your cause. Below are some tips for how to use surveys as an organizing tool.

- 1. Make sure you have a clipboard with organizational contact sheets.
- After you finish the survey ask the respondent if they've heard of your organization and if they'd like to get more involved.
- Ask the respondent if they are interested in joining your efforts by becoming a surveyor and surveying others.
- 4. Whether or not the person is eligible to take your survey, make sure you get the person's contact information so you can follow up with them.

Tool 3.3: Tips for Conducting Surveys



3. Getting Your Data: Surveys

Activities

Survey Administration Training

Tools

Survey Template Sample Rap for Surveying Tips for Conducting Surveys

Needs Assessment Survey Template

Case Studies

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TOP



FAQ Sheets

- Help explain the purpose of the survey
- Can help answer commonly asked questions (or what you think will be commonly asked)
- Good to send out surveyors prepared with this sheet on a clipboard
- See <u>Tool 3.21 Sample FAQ Sheet for</u> <u>Surveying</u>



Sample FAQ Sheet

Researcher Responses to Common Questions

CAAAV Public Housing Survey

Review these common questions before conducting your research, and bring this sheet with you for reference.

Q: Why are you doing this research?

Researcher Response: CAAAV is an organization that works with low income Asian communities throughout New York City. We have been talking to tenants who have experienced difficulties in NYCHA. Currently, there is no material that documents our communities experiences in public housing. Our plan is to write a report based on the survey research, which will include recommendations for NYCHA. Eventually we want to work on a campaign to make NYCHA a better place for Asian residents.

Q: Who will you share this information with?

Researcher Response: Your name and contact information will not be shared with anyone outside of our organization, where they will be used only to follow up with you to invite you to know your rights trainings, and events related to our ongoing organizing work. Your answers to the questions, which will not be publically connected to your name, will be used to generate data about the experiences of Asian tenants of public housing.



Informed Consent Forms

DOWNLOAD TOOL 3.6 AS / PDF

DESCARGA

3.6 EN ESPANOL

HERRAMIENTA

Tool: 3.6 Informed Consent Form Template

Please consider this information carefully before deciding whether or not to participate in this research.

Purpose of the research:

[Insert a few sentences about the purpose of conducting the research.]

What you will do in this research:

[Insert a few sentences to explain to the participant how they will be participating in the research. For example: You will participate in a personal one on one interview where you will be asked to answer various questions about your experience as someone that works in a fine dining restaurant].

Time required:

[Insert how long the interview will take.}

Risks:

Insert any anticipated risks associated with the research. If there are none, write: there are no anticipated risks associated with participating in this study. Your name and any other identifying information will NOT be shared with anyone.

Benefits:

Write any benefits that will be gained through this research. For example, at the end of the study we will write a report, which will document your experiences as



Tool: 3.6 Informed Consent Form Template



3. Getting Your Data: Interviews

Activities

<u>Creating Effective Interview</u> <u>Questions</u> Interview Role Play

Tools

Tips for Creating Effective Interview Questions

Interview Guide Template Informed Consent Form

Template

Case Studies

VOCAL-NY and CDP Report: Stuck in the System

TOP

MOVING FORWARD

Research For Organizing Webinar Series

• Module 4: Surveys – Quantitative Data

Moving Forward

- Module 5: Focus Groups & Interviews Qualitative Data
- Module 6: Mystery shopping/observations
- Module 7: Data Entry
- Module 8: Creating research findings and Policy Recommendations
- Module 9: Presenting & Releasing your Research

