Grappling Hooks and Other Essential Survey Tools for Eliciting Information Like a Ninja

Jeremy Penn, Ph.D.
Division of Student Affairs
Student Affairs Assessment
Review from our previous sessions:
- Creating clarity on your survey’s purpose, selecting an appropriate sample and sampling strategy

- Writing survey items that respondents will interpret the same way, be able to respond to accurately, be willing to answer, and are suited to the method of data collection

Today: learning to use our tools well and getting a good response rate!
How will we get anyone to freely give us their time to complete our survey?
“The barbarous custom of having men beaten who are suspected of having important secrets to reveal must be abolished. It has always been recognized that this way of interrogating men, by putting them to torture, produces nothing worthwhile. The poor wretches say anything that comes into their mind and what they think the interrogator wishes to know.”

--Napoleon Bonaparte, 1798
“Disclosure [in an interrogation setting] was 14 times more likely to occur early in an interrogation when a rapport-building approach was used...Rates of detainee disclosure were also higher when they were interrogated in comfortable physical settings.”

Key point: Don’t torture your respondents!

You will get a much better response if you focus on building rapport and making it comfortable for respondents to participate in your survey!
Why do you respond to surveys?

Why do people respond to surveys?

Responses based on Singer, 2013
1. Altruism
2. Egoistic: some people enjoy taking surveys or will see personal benefit from the results
3. Survey Characteristics

- Strongly agree
- Agree
- Disagree
- Strongly disagree
All-in-all, the likelihood of a person accurately completing your survey “is greater when the respondent trusts that the expected rewards of responding will outweigh the anticipated costs.”

--Dillman, 2000, p. 27
Building Trust
1. Provide token or incentive in advance

For example, send a $2 bill in the mail with the survey invitation.

- “Generates feeling that one needs to reciprocate” – creates goodwill and social exchange
- Maybe $1 - $5 as prepaid, but newer articles suggest maybe $5 - $10 (amount depends on your target population – we recently were selected as a Nielsen family for a week and they paid $30 up front for our participation)
- NDSU does not generally allow prepayment incentives with NDSU money (but if you have other funding sources you might be able to do this)
- Entry into a drawing or post-survey payment doesn’t work as well because it doesn’t elicit the feeling of a need to “reciprocate for a previously made gesture of good will” (Dillman, 2000)
2. Sponsorship of survey by a legitimate authority

For example, “the President of NDSU invites you to participate in an important survey on…”

But, you don’t want to make it so authoritative that they won’t be willing to tell you what they really believe!
3. Make the survey appear important

- “This survey will be used to set funding priorities for the coming year for your department…”

- “This research will improve our efforts to support students like you in future years…”
4. Invoke exchange relationships

- “We’ve made these materials freely available and now would like your input on how we could improve our services.”
- “You have participated in 12 free webinars and we would like to get your feedback on how these webinars could be improved.”
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Using Rewards
Not all rewards have to be monetary

- Show positive regard
- Say thank you
- Ask for advice
- Support group values
- Make the questionnaire interesting
- Give social validation
- Communicate scarcity of response opportunities
- Share results and feedback
- Give tangible rewards
Appeal to altruistic and egoistic benefits:

- “This will help us improve our program for future students.”
- “We really need your help to understand how students experience the transition to college.”
- “You will receive your Depression Index score which you can use to make decisions about your mental health support service needs.”
Incentives

Incentives increase response rates to surveys in all modes of delivery

(Singer, 2013)

**NDSU has restrictions on research incentives and has paperwork requirements – make sure you follow them if you are using NDSU funding!**
Monetary incentives ($500) work better than gifts (an iPad)

Prepaid ("here’s $10") works better than promised rewards ("We will send you a check when you finish") or lotteries (e.g. "We will enter you in a drawing for...")
No good evidence for the $$ amount of the incentive, but there is clearly a declining rate of return for higher amounts
• Have to consider the respondents’ likelihood of responding without any incentive at all
• Would the incentive money be better used in other ways, such as paying for phone survey administration or sending out paper questionnaires?
  • This is a case-by-case decision, but often you are better off using your small budget on pre-notification letters or other marketing efforts than on a small drawing
Reduce Costs
Avoid inconvenience:

“Please retrieve form 8862 from your prior year’s tax return and report whether or not box 2.c is checked.”

Consider what it would take for someone to answer the question when you write it!
Make questionnaire short and easy (or at least appear that way)

For an electronic survey, break longer surveys into multiple pages, reduce required scrolling, make navigating the survey straightforward and obvious.

Minimize requests to obtain personal information
Emphasize similarity to other requests ("You completed a similar survey last year, we are now asking again to see if your opinions have changed")

“Just bring me my usual order...."
Reduce Social Costs

- Avoid subordinating language ("as your superior, I demand that you respond now") or the perception of subordination (e.g., "Your time isn’t as valuable as mine so I’m going to send you a survey full of typographical errors.")

- Avoid embarrassment ("When was the last time you smoked pot?")
  - Respondents consistently underreport socially undesirable behaviors, although self-administration of surveys (vs. with an interviewer) showed less of this effect
  - These items become problematic when our respondents don’t want to tell the truth
What to do about embarrassing questions?

1. Remind participants about the confidentiality/anonymity promise and encourage honest responses.
2. Give the survey outside the presence of third parties who might influence responses (such as parents).
3. See Tourangeau and Yan (2007) for more info (Sensitive Questions in Surveys, *Psychological Bulletin 133*(5)).
Use methods that reduce social desirability bias

- Write items using neutral language or even “forgiving” wording:
  - “Even the calmest parents get angry at their children sometimes. Did your children do anything in the past seven days to make you yourself angry?”
- For questions related to income, use “unfolding brackets” which allow placement of the respondent in a general category if they won’t answer a specific question (e.g. What is your income? If refused, ask “is your income more or less than $100,000” as it is less sensitive but might still provide you with some data)
- Attempt to match interviewer-respondent demographic characteristics
- If using a survey interviewer, consider a special technique such as:
  - randomized response technique (RRT, where you use a spinner)
  - item count technique (where you hold up a list of behaviors to a group and ask them to state whether or not they’d done everything on the card and then use a different card with the sensitive item omitted and ask again), or
  - three-card method (divide the respondents into three groups, ask each group a yes / no question about membership in a particular status, then use math to determine how many are in the remaining ‘sensitive’ group)
What response rate is sufficient?
ACCURACY MATTERS: It is just as important a consideration as response rate

That is, it doesn’t matter how many people take your survey if they don’t or can’t accurately answer the questions!
If 1 person’s response truly represented the views of the group, then a response rate of 1 would be “enough”.

We worry when those who respond are systematically different than those who do not respond (and this leads to non-response bias).

- Response weighting can be used to adjust for demographic differences (e.g., in many NDSU surveys females respond at higher rates than males; if males and females differ in their responses we can statistically adjust the responses to match the population proportions to reflect what our responses would have looked like had enough males participated).
In many settings getting over 50% response rate requires a heroic effort.

Many NDSU surveys of students average around 18-22%, although survey ninjas have reported response rates in the mid 30% or higher.
What are the best techniques for administering a survey to ensure a high response rate?
Use Multiple Survey Contacts

- At least 5 contacts are recommended
- If you don’t get at least a few people responding asking to be removed from your survey contacts, then you aren’t sending enough contacts
Use different forms of contact – e.g., telegraph, telephone, post cards, email, physical mailings, text messages, Tweets, Facebook...?
Be Systematic About your Contacts

1. Paper pre-notice letter with token incentive
2. Email survey link
3. Email reminder (or text message reminder)
4. Postcard thank-you and reminder
5. Paper survey and final reminder with a stamped return envelope

*Imagine if you did this – wouldn’t this make your survey stand out from the crowd?
Pre-notification letter

- Some people like to know they will be receiving a survey
- Makes your survey stand-out from the pack
- Allows you to correct errors in your contact list (“if you are not the correct person to receive this survey, please let me know by...”)
- Send just a few days before the full survey contact
- Include trust-building elements, such as letterhead, personalization, signature
- Goal is to convey the survey is important and to get people to look for it
Survey contact

- Carefully draft the invitation to participate (the email)
- Consider including a full informed consent in the survey itself (so as to encourage people to click from the email to the survey and not be overwhelmed with the invitation text)
- Include as much personalization as possible
  - “Dear Student” suggests to many students that this message can be easily ignored
- Ask for help with an important project
- Describe the project and why it is important (but try to do this without bias)
Follow-up contacts

- Continue to personalize the contacts
  - “We have not yet received your survey.”

- Continue to highlight the importance and usefulness of the survey
  - “We need your help on this important survey.”

- Consider switching to a different mode of contact for at least one of the follow-up contacts
  - Send a post card, text message, or phone call instead of another email
  - Perhaps 50% of NDSU students are not regularly reading their NDSU email
Timing survey contacts

- With paper mail, the guidance was usually to wait about a week between mailings.
- With email an electronic mailings the timing is usually much shorter
- In both cases the goal is to keep the survey close enough to the top of the pile so it isn’t forgotten and so the person will actually complete your survey
- With many emailed electronic surveys, I don’t see many responses after about 3-4 days and it would be time to then consider a reminder
A note on anonymity

- I rarely recommend a truly anonymous survey.
- The benefits of knowing who has responded are so substantial:
  1. You can link responses to demographic characteristics without having to ask them in the survey (which makes the survey shorter and sometimes people either won’t answer these questions or answer them incorrectly) (This can also be done in Qualtrics with anonymous surveys if you “embed” the demographic items into the survey and they are sufficiently general.)
  2. Saves cost and time for follow-up messages, particularly phone calls or paper mailings.
  3. Enhances the personalization in that those who have responded can receive a “thank-you” message and will stop receiving survey notifications.
- Surveys are confidential, not anonymous.
- The only time I would do an anonymous survey is if the survey topic were very sensitive or other rare circumstances.
Activity

- Spend a few minutes working on your survey contact plan with a neighbor
- What will you do for your five contacts?
- When will your contacts be sent?
- What multiple communication modes will you use?
- How will you get access to the contact information for your survey sample?
Response rate summary:
• People are more likely to respond when they trust that the rewards for completing your survey will outweigh the costs!
• Of course, getting a good response rate is no guarantee of accurate results (and vice versa)
• If you are concerned about non-response bias, there are strategies you can use after the initial data collection is completed (such as calling those who did not respond and having them complete the survey to compare to those who responded through the usual mode)
• Relevance of the survey matters!
• You can get a better response rate if you use these strategies! Put on your ninja gear!
Survey Tools
Classroom-like data collection

- Minute papers
- Notecard handouts
- Live data collection (e.g., “clickers,” or Poll Anywhere, Campus Labs’ Respond (Student Affairs only))
- Etc.
- You can get good data without having to build a formal survey!
Kahoot It – Gamification and collect data

- [http://getkahoot.com](http://getkahoot.com)
- Create learning or poll games for online interaction during an event
- Students participate through an internet-connected device
- Players can compete in teams or against each other to earn points with correct answers (multiple-choice style)
- Can use for polls and discussion generation as well
Text Free Web (formerly “Pinger”)

- [http://Textfree.us](http://Textfree.us)
- Get a free phone number to send and receive text messages
- Can access through the web
- Also have a mobile app
- Can use it to receive live feedback, respond to questions during a presentation, or a “ask a question” all through text message
- “How was your meal today? Text XXX-XXX-XXXX.”
NDSU makes the Qualtrics tool available to all NDSU staff, faculty, and students.

Create a free account by logging using your NDSU credentials: [http://ndstate.qualtrics.com](http://ndstate.qualtrics.com)

Much more powerful and useful than a free SurveyMonkey account or most any other electronic survey tools.

Not the best tool for creating paper surveys.
Other workshops are available to dive into Qualtrics, so I’ll give you the 10,000 foot view and an overview of some of my favorite (and lesser-known) Qualtrics features.
“Projects” link where information about your surveys is provided
Survey name (can be whatever you want)

Current survey status (new, active, or closed)

Number of completed responses

Additional survey options (next slide)
Select the question type then type in your questions here – questions are grouped in “blocks” (or pages) that you can order and manage later.

*Ninja Tip: Each block will appear on a separate page in your survey so make them bite-sized! You can also easily re-order and route respondents by block, so design your blocks carefully!
Have a tremendous number of different question types, many with sub-types. Be sure to check for accessibility when selecting your question types. The ones you will likely use most are: multiple choice, matrix table, and text entry.
Can set up validation requirements (such as requiring a properly formatted email address in a text question)

Can determine the circumstances for which this question is displayed (including answers to other questions or respondent characteristics)

Can skip a respondent to the end of the survey if they answer a disqualifying question, for example

Can require a response (survey will not go on unless the question is answered) or request a response (pop-up box will note the question wasn’t answered but will allow the person to continue)
Change background colors, buttons, etc.

Use logic to navigate users through question blocks (a better choice than “display logic” in most cases)

Modify options, like title, end-of-survey message, etc.

Powerful tools, like spell-check, survey testing, email triggers
Use this tab to distribute your survey using either an anonymous link or a direct email message to your respondent panel.
All surveys have an anonymous link that you can send out, post on Facebook, Tweet, etc. Will record responses but you will not know who has / has not responded.

Your Anonymous Survey Link:

https://ndstate.co1.qualtrics.com/SE/?SID=SV_3QWK3kAd5LjCNbn

You can copy this link, then paste it into an email or website.

Note: This will not track identifying information. If needed, try our Survey Mailer

If you send direct emails through Qualtrics each user will receive his / her own unique link – allows you to track responses and send reminders only to non-responders! It also allows you to link respondents to their demographic information - this is a total ninja move!
Better option: use the provided survey mailer. Write your message, select survey panel, schedule it when you want, and schedule reminders in advance. **Personalize through “piped” text.** Include a question from the survey in the email message (takes respondent to that question with their answer entered).
“Contacts” link (formerly “Panels”) to manage your survey contacts – the people who will receive your survey
Contact list must include First Name / Last Name / Email address, but can also include any additional variables you want!

Can type in contact list or upload from an Excel file.

<table>
<thead>
<tr>
<th>Opted In</th>
<th>First Name</th>
<th>Last Name</th>
<th>Email</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Jeremy</td>
<td>Penn</td>
<td><a href="mailto:jeremy.penn@ndsu.edu">jeremy.penn@ndsu.edu</a></td>
</tr>
</tbody>
</table>
Allows you to see your results in a basic, non-aggregated format
 Allows you to see aggregated reports, charts, etc.
Big update in this version of Qualtrics, although it will take some trial and error

I usually download my results and analyze, which you can do in Excel or directly to SPSS (with the coding!)
Has this ever happened to you?
The Top Qualtrics Features “They” don’t Want You to Know About

- Question timings (e.g., require a certain amount of time on a question before the “next” button appears)
- Email triggers (automatically send an email to someone when a survey is completed)
- Using embedded data to route respondents to questions relevant only to them
- Uploading respondents’ answers from a previous version of the survey so they can see how they answered the survey previously (great for longitudinal surveys)
- Changing the look / feel of the survey to match the theme of your event (dozens of options to explore)
- Using basic coding to add features to items (such as showing a word’s definition when you hover over it)
Question Timings

- Add as a separate item
- Is selected as an “item type”
- Can limit how long a respondent has on an item OR
- Can require respondent to view an item for a certain amount of time (such as watching a video)
- Also tracks length of time between clicks for respondent
Email Triggers

- Found in “Tools”
- Can automatically send you (or anyone) a notification when a survey is completed
  - Survey ninja: Use text piping to send the email confirmation back to the person who completed the survey, or to the specific person (such as the student’s advisor) unique to each student
- Good for customer service or satisfaction surveys so you can see when you need to respond to something
- You can write the text you want to see in the message, choose when you want the message sent, and include the survey results if you want
Using embedded data

- Upload on the “contacts” tab along with First Name, Last Name, and email address
- If you are Anonymizing Responses (using the “Anonymize Responses” under Survey Options), make sure you “embed data” in the survey flow, otherwise you will not be able to link to your demographic information
- Can then route respondents to question blocks that are just for respondents who have certain demographic characteristics – and, you DON’T HAVE TO ASK DEMOGRAPHIC QUESTIONS (which shortens the survey and, honestly, sometimes people answer incorrectly) – a total survey ninja move
Uploading responses from previous surveys

- Great for longitudinal surveys (e.g., “in September you scored your communication skills as ‘3’, where do you feel your communication skills are now?”)
- Must use the direct email distributions in Qualtrics
- Upload the previous survey responses as a group in the contacts section
- Can “pipe text” into survey questions to show respondents their previous answers
- New results will be connected to the old results for ease of analysis
Changing the look / feel of the survey

- NDSU has a standard template “look”
  - It is used very frequently, so people might feel it is cliché – but, it does have NDSU branding which can help make it feel official
  - It uses “>>” for the next button. For accessibility this should be “Next” instead. If you will use the default NDSU theme you should at least change that (under “Next Button Text”)

- Qualtrics offers 50 additional choices and you can do some customization as well

- “Minimal 3d – Gold” is my favorite
Basic Coding features

- Can use HTML code within the text for any item to adjust the way that item appears on the screen

For example, this code:

```
I am immersed in my work.
```

Shows a definition for “immersed” when you hover over it in the survey:

```
I am immersed in my work.
```

I get carried away when I'm deeply involved or engrossed.
www.Qualtrics.com/support

You can also call them (1-800-340-9194) or ask Linda Charlton-Gunderson (our NDSU expert, 231-6414) for help!
Paper surveys

- Usually just build these in Microsoft Word
- In a recent face-to-face survey, about 25% of students opted for a paper survey over completing electronically – either couldn’t get on the internet or preferred the paper version
- Scannable bubble sheets also available at NDSU – https://www.ndsu.edu/its/instructional_services/omr/surveys/
- Currently NDSU only supports two scannable forms which require a separate paper survey
- Having worked with scanners in a previous job, many other places allow you to order custom, printable bubble sheets that are scannable but NDSU does not appear to support this with current equipment
Survey tools summary

- You have more access to better survey tools than any of the greatest researchers in the history of the world
- Pick the right tool, and use it well!
Final Project

- In order to complete the Survey Ninja training, you must complete a final project.

- If you submit it before our next meeting, I will have completion recognition ready for you.

- Projects can take multiple forms:
  - Updated survey instrument
  - Survey plan or proposal
  - And so on

- You should also include a ½ to 1-page summary of how you used what you learned in your project.