



## **Introduction to Survey Research**

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It is not uncommon for people to doubt the results of a survey, unless they feel confident the survey was done “scientifically.” A survey that has gone through the steps of the scientific process poses a higher percentage of validity and reliability of the results.

Rarely, can every member of a population be studied because it is cost prohibitive. Public opinion survey research is the most efficient method for collecting information about a large group of people. A researcher is able to collect the opinions, perceptions and observations of a small, representative subset of a population in order to generalize to the whole.

Communities want to feel heard by their public entities and local representatives. Valid survey research is a valuable and powerful tool because it enables a public entity to solicit opinions from community members they may not otherwise communicate with on a regular basis.

It is important to keep in mind, however, that surveys can be a two edged sword. On one hand, when they are conducted with the intention of using the results to formulate a proposal that is reflective the community’s input and priorities, it can foster a greater level of trust and goodwill and increase the likelihood of support for that public entity.

On the other hand, when surveys are conducted with a proposal already in mind with no intention of altering that proposal to reflect the community’s input and priorities, it can foster resentment and mistrust that can be very difficult to overcome. Communities have very, very long memories.

### **Qualitative Research**

This type of research is used to gain an understanding of underlying reasons, opinions, and motivations. It provides insights into the problem or helps to develop ideas or hypotheses for potential quantitative research. Qualitative Research is also used to uncover trends in thought and opinions, and dive deeper into the problem. Qualitative data collection methods vary using unstructured or semi-structured techniques. Some common methods include focus groups (group discussions), individual interviews, and participation/observations. The sample size is typically very small, and respondents are selected to fulfill a given quota.

## **Quantitative Research**

This type of research is used to quantify the problem by way of generating numerical data or data that can be transformed into useable statistics. It is used to quantify attitudes, opinions, behaviors, and other defined variables – and generalize results from a larger sample population. Both qualitative and quantitative public opinion survey research are an absolute necessity to that process. Some level of survey research is a necessary ingredient for the management and execution of any money measure campaign.

In terms of education, voters are often schizophrenic. On one hand, survey research data indicates the electorate believes a high quality education system should be a major priority for any school district. On the other hand, they differ as to their individual definitions of "high quality" and how much they are willing to pay for it.

Different school districts have different databases. It includes everything from virtually no data, surveys conducted by volunteers to formal benchmark surveys.

The Nelson Report feels very strongly that every campaign needs a quality data base. Survey research for the purposes of planning for the future needs of a district is a legitimate expenditure of school funds. The research document, however, is a public document and available to any citizen that requests it.

## **Community Perception Survey**

A community perception survey begins a dialogue with the community to find out what public perceptions are about the district (operation and performance, physical condition of buildings, overcrowding, information sources, money management, etc.), as well help determine what the public believes the future priorities of the school district should be (curricular and/or construction/renovation of existing buildings). This type of survey can also include a priority series that tests potential construction projects that may be included in a future bond measure and test price points to help a school district put together a bond proposal (package) that reflects the community's priorities. These surveys can be conducted semi-annually, or in advance of a benchmark survey to get a sense of how much education will be necessary for the community to be informed about public entity needs. These types of surveys conducted regularly, can also be used to on-going communication and dialogue between the public entity and its community.

## **Benchmark Survey**

A benchmark survey is a voter population survey with special emphasis on eliciting the public's perception of the public entity's job performance and support or opposition to a potential money measure (bond or levy). In addition, these surveys also test specific messages to determine if there are messages that positively or negatively impact support. These surveys also test priorities and include an agree/disagree series to test the voracity of those messages that have been tested. The results from these surveys become the bible for the district's decision-making process and campaign.

These surveys often include information that would be helpful to a campaign. Because it is public information, it could also be helpful to the opposition.

Benchmark surveys can be conducted by volunteers or a professional organization. As one of those professional organizations, The Nelson Report does not recommend surveys conducted by volunteers.

Seriously, there are often major problems encountered by trying to conduct a survey with volunteers. Selection of sample(s), questionnaire design, and computer formatting are just a few of the areas of concern. More importantly, volunteers are advocates for the district. Otherwise they would not be volunteering. That advocacy tends to spill over into the administration of the survey instrument and the product then becomes suspect. It does not do any good to base a campaign plan upon data that might make one feel good but is not accurate.

### **Problem Definition/Goal Setting**

Before beginning to develop a survey, a researcher must conduct a "needs analysis" and obtain background information. The researcher should always get information regarding the client and the level of resources the client has at stake and determine the purpose of the survey, or what decisions will be made based on the results. Understanding this purpose will allow the researcher and the client to determine the goals and objectives of the survey. Goals should be clear and concise so that they can be directly associated with the survey results. Specific goals reduce the risk of the data and results being manipulated, or accused of being manipulated, to serve a hidden agenda.

### **Selecting a Sample**

Perhaps the most important step in conducting a survey is selecting the sample that will adequately represent the population of interest. If this is done incorrectly, a survey and the work that is expended in the research is rendered meaningless. There are various sampling designs that can be selected.

The important elements to a dependable sample are to ensure that the correct population is being sampled and that all members of that sample are identified and have an equal opportunity of being selected. When the results of the survey are being reported, it is imperative that the rationale for the sampling design be disclosed. Disclosure will involve describing the "universe" and explaining why and how the sample was drawn.

This is why The Nelson Report uses L2 Voter Data to assure the survey sample of voters accurately represents the total number of voters in each voter category.

## **Questionnaire Design and Testing**

The research goals should always direct how survey questions are asked. Whether the data to be collected is quantitative or qualitative, the survey instrument must be designed so that it obtains objective, unbiased results. The following are some basic points to remember when building questionnaire, though the list is not exhaustive.

- Questions should not be leading.
- Questions should only ask for one piece of information.
- Questions need to be relevant to the topic of interest.
- Questions and response categories should be suitably designed and coded for the necessary statistical analyses.
- Questions should not be threatening to the participants.
- Questions should use language appropriate to the participants.
- Questions should be organized in a logical manner.

Once the survey instrument has been designed, The Nelson Report pretests the questions and procedures to reduce error and identify problems. It is impossible to forecast all the potential biases that await a survey once it is administered to a sample. Pilot testing the instrument with a small sample will reduce the sampling and response error once the survey is given to the true sample.

## **Data Collection**

Once the pretest is conducted and necessary alterations made, there are a few final steps before The Nelson Report actually sends the survey into the field. For telephone surveys, careful training on interviewing techniques are incorporated. The Nelson Report interviewers are skilled at making initial contacts, dealing with difficult respondents and ensuring confidentiality, and have familiarity with the survey development and implementation process. If interviewers are not trained properly, their unintentional actions or words can impact how respondents react and answer the questions, thus resulting in unnecessary error.

Another important consideration is the treatment of human subjects. Ensuring confidentiality or anonymity is of vital importance. The script should explain the purpose of the survey, how respondents were selected to participate, that it is voluntary and their confidentiality or anonymity will be protected.

## **Data Analysis**

Analysis of data is a process of inspecting, cleaning, transforming, and modeling data with the goal of discovering useful information, suggesting conclusions, and supporting decision-making.

## **Report Writing**

The final phase of the survey process is reporting the findings. The major elements of reporting the results include (this list is not exhaustive):

- disclosure of client, research company and dates of data collection;
- purpose of the research;
- the methodology employed;
- sample size;
- discussion of the findings;
- copies of the questionnaire,

## **For further information**

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