Step-by-step survey guidelines – Online Toolkit

Build and send surveys using the survey builder tool on the Feedback Commons

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Introduction

There are a number of different surveys that you can build using the Online Feedback Toolkit. They all work in the same way and follow more or less the same steps.

The Survey Builder tool for each of these surveys follows a simple step-by-step process that almost anyone can follow. Illustrations are drawn from different surveys. While the illustrations might look different to the screen you are working on, it should still be clear what you need to do.
Step 1. Introduction to the survey builder

The first panel that you see is a short introduction that gives you an outline of the steps to building a survey.

On the left you will see a ‘ladder’ of all the steps. You move through the builder by clicking on the different ‘steps’ of the ladder.

Click step 2 ‘Select questions’.
Step 2. Choose standard questions from a list

On this page, you select the standard questions that you want to include in your survey by clicking on the button next to the question that you wish to include.

Why standard questions?
Some of the questions that you include in your survey must be asked in exactly the same way in all surveys. We call these the standard questions. We do this because you can only compare feedback from different countries or from different years if you have asked the same questions.

Later you will have the opportunity to create questions of your own.

Please do not include more than a combined total of 5-6 questions in each survey. If you want to ask all the standard questions, it would be better to do so in different surveys.

Why you should keep your survey short
Keystone has found that it is often better to choose fewer questions (5-6 at most) each time you send out a survey.

- The survey can be answered more quickly – and you are more likely to get thoughtful responses.
- Response rates tend to be higher.
- You cannot properly discuss more than 5 or 6 questions at a single dialogue session.
- If the feedback is negative, it is much more intimidating and difficult to respond to 15 pages of negative feedback than four or five pages.
- Although Agency surveys will mostly be sent by email, Community Centre and Family surveys are often easier to conduct using paper forms. Then your survey must fit onto one side of one page.

You can conduct a survey any time you like. This means that you can ask some questions in one survey and others in a second or third survey.
Step 3. Add your own questions

On this page you can create your own questions. Because the question is unique, it is not possible to provide any comparative benchmarks in the analysis.

1. Write your question in the box provided.

2. Then choose how you would like people to answer the question. In this toolkit there is only one option.
   a. Select **Open text** if you want them to be able to write in their own words.

3. Then click on **Create this Question** and the survey builder will create your question at the bottom of the page. Check it to make sure that everything is as you want it to be.

4. Once you have created a custom question, you can create another one by following the same steps.

Remember that the questions that you select on this page will be added to the questions that you selected on the previous pages! If you find that you have selected too many questions, you can go back and change your selections.

In a custom neighbourhood on the Feedback Commons you can build different kinds of custom questions.
- Select **Scale** if you would like them to choose a number on a scale. The default scale is from 0-10. And the results will be analysed using Net Performance Analysis. Scores are summarised into three groups: Positive (9 & 10), Okay (7 & 8), and Negative (all scores 6 or below).
- Select **One from a list** if you would like to offer a multiple-choice list of pre-defined answers – and want the respondent to select only one option.
- Select **Any from a list** if you would like to offer a multiple-choice list of pre-defined answers – and you would like the respondent to select all the options that apply (more than one option).
Step 6. Information about respondents

Comparing feedback from different constituent groups

When we come to analyse our feedback results, we can learn a lot by comparing what different groups of respondents say. But to do this, we must ask them to tell us a little about themselves in the survey.

On this page you can ask respondents to tell you their gender and age by clicking the box next to the relevant question. In the survey, respondents will select their answer from the list of options written in smaller italic text in brackets.

You can also ask people to tell you their location – but to do this you must first enter the locations that are relevant to your situation. Enter the place names in the box – separating them with a comma. In the survey, respondents will choose from the list of place names that you have entered.

Remember: If there are only a few respondents, some people might not want to answer a demographic question because it will enable you to identify who they are. Avoid asking such questions if your respondent group is very small.
Step 5. Introduce your survey

**Title**
Please think carefully before you give your survey a title!

When you are looking for your survey results to analyse them, you will most often search for the title of the survey. You should work out a consistent way of naming all your surveys. For example,

**Feedback survey [service users] 1/2019.** Then use the same style for all your surveys!!

**Introduction**
You should include a short introduction to your survey so that respondents know what it is about.

In this text box we have created some sample text that you can use if you want to. You can use it as it is, or you can modify it in your own words. You can even replace it entirely with your own message.

When you are happy with your introductory message, click NEXT.

You will then be taken to another part of the Feedback Commons as your survey is built.
Now wait while your survey is being built...

As your survey is being built (it can take up to 10 minutes) you will see this screen. It will tell you when your survey is built. Then you can choose how to send it out.

While it is being built, you will see an orange box. **Build progress: This survey is queued**

When the survey is built, the box changes to green and says **Build progress: This survey is ready to use**.

Now you must decide how to send the survey out. To do this, see the next page.
The final step: Decide how you want to collect the feedback

When your survey has been built, you must choose how you wish to send the survey out. At this stage, we recommend only two options:

- If you want to print a paper survey form to collect feedback manually, select **Paper: Processing**
- If you want to use email, select **Email campaign tool:**

If you choose the **Email campaign tool:**

- you will be asked to enter the email addresses of all respondents. You can enter the email addresses manually separating each address with a comma. Or you can copy email addresses from a spreadsheet and paste them in all together. Check to make sure that the addresses are correct and that they are separated by a comma and a single space. There should be no other characters or spaces.
- If you have done it correctly, the addresses in the box will look like this:

![Email campaign tool example](image)

- The survey will be sent automatically to all the email addresses. And their responses will be automatically captured in the Feedback Commons.

If you choose the **Paper: Processing** the survey builder will create a MSWord document. Save this on your computer and give it a name that you will easily find again.

Now you can edit the survey form.

- You can reformat the document so that it all fits onto one side of one page by reducing the margins, making the type smaller, reducing the space between lines etc.
- You can translate the English questions into local languages.

**However, do not change the numbering or the order of the questions!!**

For each paper survey, we strongly recommend that you do not ask more questions than you can fit onto one side of one page. A one-page survey is quick and easy to complete. It costs less and is much easier to manage – with less chance of losing pages. It is also quicker and easier to upload your responses into the Feedback Commons database. And you should be able to discuss all the responses properly in a dialogue meeting of 60-90 minutes. In sum, short surveys are more likely to help you to improve.
What happens after you have sent your survey

Immediately after you have sent your survey out, you will receive an email from the Feedback Commons that looks like this:

Dear [your name],

Your survey is ready.

Collecting feedback

If you have already sent it out to your respondents, that's great! If not, you can send it from here using any one of these options:

- **Link to your online survey for partners:**
- **Our email campaign tool:**
  - Sends reminders to those who don't respond immediately. (It will only send reminders to people who have not taken the survey.)
  - Reminds you when people reply
  - If you designed your survey with multiple groups of stakeholders, this will separate their responses for analysis later.
- Or you can email this yourself, using this link:
- **Paper versions are available.** contact us.
  If you use paper surveys, you can use the online link to enter them into the system, or we can help with transcription if you have a lot of responses.
- **Embed your survey on a website**

Have questions? Need advice? contact us and we'll set up a call.

We will email you again when at least 5 people respond, and periodically for the next 3 weeks as more responses come in. When you have responses, we'll invite you to analyze your data and demonstrate how to use our tools.

Manage all campaigns

Learn how to analyze your responses using some randomly generated data.

You should save this email somewhere safe – because it contains important information.

The online survey link
The most important thing in this email is the online survey link. If you click on this link it will take you to the online survey form of the survey you just created.

You can use this link to:
- Check that your survey has come out exactly as you intended.
- Upload responses from paper forms into the Feedback Commons database.
Uploading data from paper forms
To upload data from paper survey forms follow these steps:

• Click on the online survey link. An online form will open in your browser that is exactly the same as your printed forms.
• Now type the answers to each question from the paper form into the online form.
• When the online form is complete, click **SUBMIT**.
• For each paper survey you must use a new online form.

HINT TO UPLOAD DATA MORE QUICKLY: Each time you click on the online survey link, a new online form will open in your browser under a new tab. Click on the link a few times to open ten or more forms in your browser. Then complete and submit the forms one by one.

When will your survey be closed?

Your survey will be automatically closed after 21 days. No further responses will be accepted after that time. This can be extended by arrangement with Keystone.

If you want to send the same survey at another time, or to another group, you will have to create a new survey.