

Step-by-step survey guidelines – Online Toolkit

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

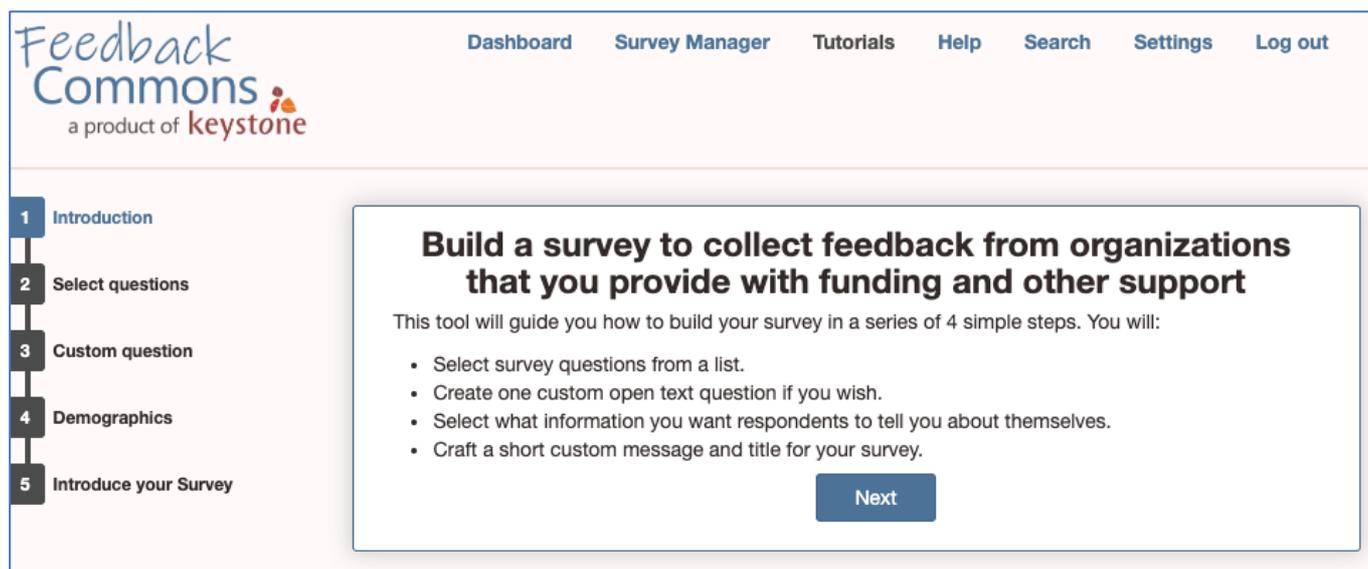
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Introduction

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 screenshot shows the Feedback Commons survey builder interface. At the top left is the logo "Feedback Commons" with the tagline "a product of keystone". To the right of the logo is a navigation menu with links for "Dashboard", "Survey Manager", "Tutorials", "Help", "Search", "Settings", and "Log out". On the left side, there is a vertical "ladder" of five steps: "1 Introduction", "2 Select questions", "3 Custom question", "4 Demographics", and "5 Introduce your Survey". The "Introduction" step is currently selected and highlighted in blue. The main content area displays the title "Build a survey to collect feedback from organizations that you provide with funding and other support" and a sub-header "This tool will guide you how to build your survey in a series of 4 simple steps. You will:". Below this are four bullet points: "• Select survey questions from a list.", "• Create one custom open text question if you wish.", "• Select what information you want respondents to tell you about themselves.", and "• Craft a short custom message and title for your survey.". At the bottom right of the main content area is a blue button labeled "Next".

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.

Feedback Commons
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Dashboard Survey Manager Tutorials Help Search Settings Log out

1 Introduction
2 Select questions
3 Custom question
4 Demographics
5 Introduce your Survey

General questions about relationship and performance

Note: Not all of these questions are relevant to all kinds of service/programs. We strongly recommend that you focus your survey and ask no more than 5-6 of these questions at a time.

- Do the staff of Green Pioneers treat all project partners and beneficiaries fairly? (0 = not at all fairly - 10 = very fairly)
- Do the staff of Green Pioneers communicate with you clearly, regularly and in good time? (0 = not at all - 10 = very much)
- Are you comfortable questioning the knowledge or actions of staff if you disagree with them? (0 = not at all comfortable - 10 = very comfortable)
- To what extent do you feel that you are involved in deciding what strategies and activities to implement? (0 = not at all - 10 = very much)

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

1 Introduction

2 Select questions

3 Custom question

4 Demographics

5 Introduce your Survey

Adding a custom question of your own

Here you can create a question of your own that respondents can answer in their own words (For now we are not able to offer custom quantifiable questions in the free toolkit).

Write your question here:

Choose the type of question:

Open text

Optional help text (this appears below the question):

Create this Question

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

The screenshot shows a survey configuration interface. On the left is a vertical navigation menu with five steps: 1 Introduction, 2 Select questions, 3 Custom question, 4 Demographics, and 5 Introduce your Survey. Step 4 is currently selected. The main content area is titled 'Demographic filters (about respondents and their companies)'. It contains the following text and options:

Demographic filters (about respondents and their companies)

Would you like to compare feedback from different sub-groups?

If so, select the demographic questions you would like people to answer.

Respondents will select one of the answer options listed in brackets for the following demographics questions.

What is your gender? (*Male|Female|Other*)

What is your age? (*Less than 25 years|25 - 34|35 - 44|45 - 54|55 or over|Prefer not to say*)

If you would like to compare responses from different places, you can include this location question.

Please tell us where you are based by selecting one of the locations listed below:

First you must create your list of place names. Type up to 10 place names in the box below. Type a comma after each place name to separate them.

[Create this Location Question](#)

Comparing feedback from different constituent groups

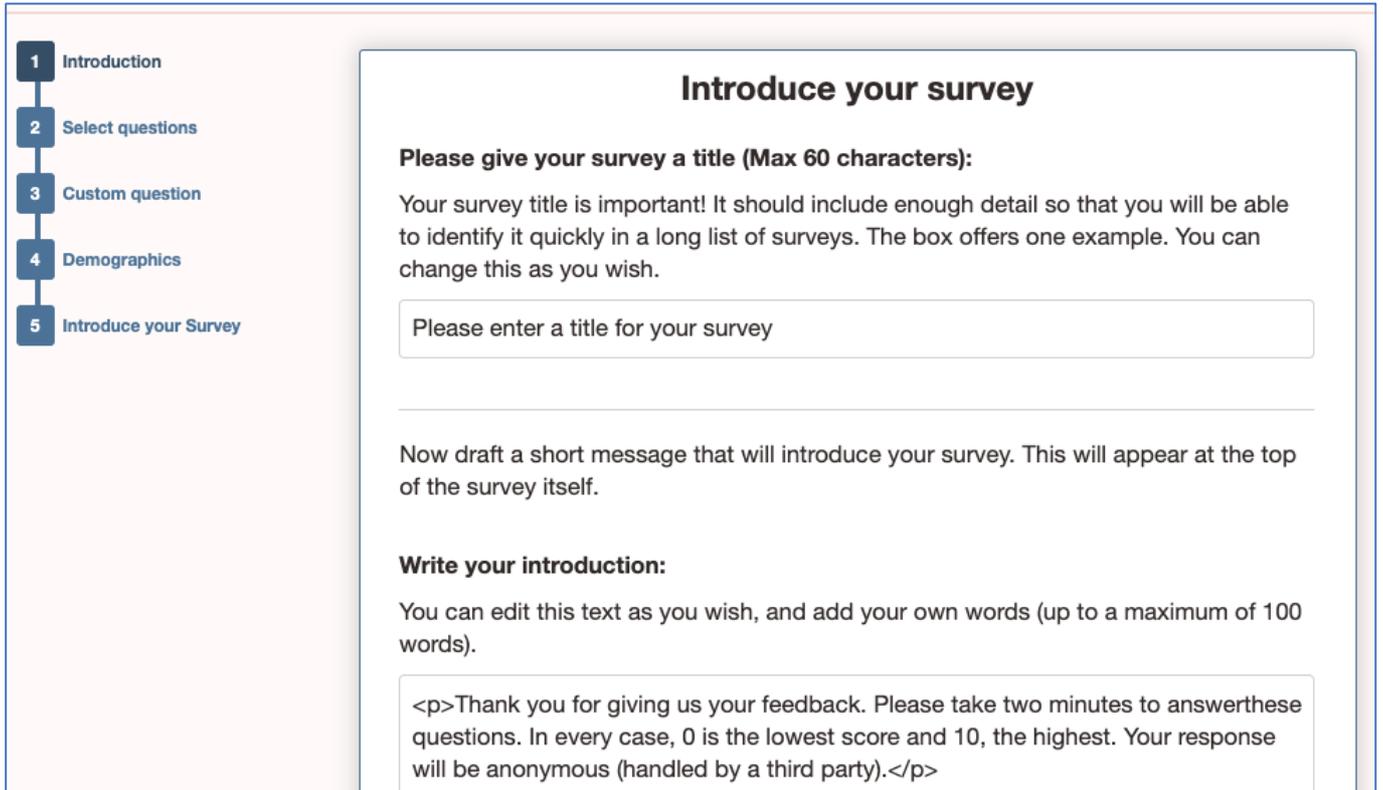
When we come to analyse our feedback results, we can learn a lot by comparing what different groups of respondents say. But to do this, we must ask them to tell us a little about themselves in the survey.

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



1 Introduction

2 Select questions

3 Custom question

4 Demographics

5 Introduce your Survey

Introduce your survey

Please give your survey a title (Max 60 characters):

Your survey title is important! It should include enough detail so that you will be able to identify it quickly in a long list of surveys. The box offers one example. You can change this as you wish.

Please enter a title for your survey

Now draft a short message that will introduce your survey. This will appear at the top of the survey itself.

Write your introduction:

You can edit this text as you wish, and add your own words (up to a maximum of 100 words).

`<p>Thank you for giving us your feedback. Please take two minutes to answer these questions. In every case, 0 is the lowest score and 10, the highest. Your response will be anonymous (handled by a third party).</p>`

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.



1 Ways to collect feedback

Ways to collect feedback

You can combine feedback from several channels.

Your survey is being built. It may take a few minutes before the links below show the complete survey.

Build Progress: This survey is in the queue.

You can choose from any of the following to send out your survey now, or return later via the link in your email. Here are some ways you can share your survey in various formats:

Link to your online survey: Your direct link will be available when the survey has finished building.

Email campaign tool: -- our **recommended** way to send out emails, because it tracks engagement rates and lets you manage feedback from multiple groups separately.

Paper: Processing

Kiosk: Contact us -- we can provide you with a downloadable survey that works on a phone or tablet for **offline** data collection.

Special options

HTML to embed your survey in a website:

Smaller version to embed your survey in email signature:

If you need more advice, [contact us](#).

What next?

Gather email addresses for the people you wish to contact. Our email campaign page allows you to separate these people into constituent groups, so that you write to them separately. It will also let you compare their responses later in the Analyze step.

When this survey is built, a new page will open. Just paste the emails into the box and customize your introductory message.

A copy of this was sent to via email. You can also find these options on the [workflow page](#) for this survey. Use these links to continue this process if you are not ready to do it now.

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.**



1 Ways to collect feedback

Ways to collect feedback

You can combine feedback from several channels.

Your survey is being built. It may take a few minutes before the links below show the complete survey.

Build Progress: This survey is ready to use.

You can choose from any of the following to send out your survey now, or return later via the link in your email. Here are some ways you can share your survey in various formats:

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:

1 Message to partners

2 Sending it out

Message to partners

Paste your emails into the box, then customize the introductory email this group will receive.

Previous Next

Separate emails with commas. We recommend no more than 30 emails per campaign.

Emails:

joe@example.com * example@example.com * jane@example.com *

Subject:

We would like to hear what you think of us.

- 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 **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:

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.