



Open-Ended Phone Survey Guide February 2018

The guide is part of a series of experiments to determine whether human-centered design survey techniques can improve the ease, quality, diversity and usability of data collected from beneficiaries. The goal is increase the agency and voice of beneficiaries through the data survey process.

Questions to Capture Diversity

Because civil society often operates in dynamic and complex environments, most organisations need data collection techniques that allow for diverse responses. Although many different techniques can be used to do this, we are testing whether the following five open-ended questions can be an effective technique for capturing diverse responses across many different events, programs and services.

Five Open-ended Questions

- 1) Please tell me about your role around the [name of the event].
- 2) Please tell me about your experience with the event.
- 3) Have you recommended the event to others? Why or why not?
- 4) Please tell me a moment that surprised you about the event?
- 5) What else should we know about improving the next event?

The benefit of a phone survey is the ability to ask clarifying questions through probes. Often responses begin generic: I had a terrific experience. However, this response neither tells us what made it terrific nor what terrific means for the respondent. Therefore, these type of responses need probing questions to help make the information specific and insightful. The interviewer can try to picture in their mind what the respondent is describing. If the interviewer cannot picture the response, try asking probing questions – how, when, and where until the response becomes tangible. However, be careful of probing too much and fatiguing the respondent. Staying to the 15-20 minute time limit is a good rule of thumb to avoid the fatigue issue.

Selection Technique to Increase Diversity

Just as important as the questions is how to select the respondents. Although organisations cannot speak to all beneficiaries, it can provide an equal opportunity of being chosen. A general rule of thumb is to randomly select participants to speak to until patterns emerge and new interviews return a diminishing return for actionable insight. We see this happen with as few as six interviews, although 20-40 and

sometimes more are needed. This data will not be representative of the population, but it does suggest issues for further action and investigation.

Close the Feedback Loop

Commit to sharing the results, the analyse and actions taken (or planned) due to the survey with the participants within six weeks. This can be as simple as an e-mail or even better a focus group discussion. This is a critical step in being sure your insights reflect the participants' experiences and expectations. It also increases faith in the process that this survey as well as future survey requests will have tangible outcomes.

Survey guide not applicable to high risk topics and populations

These questions and survey process were designed only for events, themes and participants that present little to no risk. For marginalized, targeted, sensitive, children, prison populations and others, this guide is not applicable and should not be used. Instead seek specialized resources and techniques to limit potential harm to participants.

Get the most from the survey

Hypothesis what you expect to hear. After the surveys are completed discuss with those involved what the survey results confirm and what surprises you.

Prior to conducting the phone interviews – Have those that participated in the event write responses to the the following questions before starting the phone surveys.

What percentage of the asked do you expect to agree to the survey?

What kind of themes do you expect to see in the responses around the event?

What kind of improvements do you think will be suggested?

After conducting the phone interviews – Have those that conducted the interviews and participated in the event write down responses to the following.

What percentage agreed to the phone interview? Was this higher or lower than expected? Does the percentage suggest in terms of the event and our relationship with the participants?

What themes emerged that we were expecting?

What themes emerged that surprised us?

What actions can we take based on this feedback?

Benchmarking success: How many agree to the phone survey?

The first step in conducting a phone survey is to send an introductory e-mail asking whether the individual will agree the survey. The percentage of individuals willing to do the phone survey within five days is your first indicator of the strength of your event and relationship with the participant. A rule of thumb is that if 80% or more agree to the phone survey, it is likely the event and your organisation are meeting expectations.

Number of individuals agreeing /_Number of individuals requested = Response %

Speak to those that did not attend the event

Often we can learn much from those that did not attend the event as from those that did. This is especially important if a more diverse audience or larger audience is desired. This can be accomplished in different ways. Ask colleagues and participants for personal references to speak to individuals/organisation that might benefit from the event but weren't present. If individuals or organisations participated in past events, but not this one, reach out to ask them why.

Tips and Tricks

- Send the request and conduct the survey in language they are comfortable with.
- Have a personal contact send the request.
- Use Skype credit or Uber conference to call individuals that do not have a strong internet connection.
- Mark off one hour for each interview. Often, you will need a few minutes to connect to the person and twenty minutes after the call to write-up your notes and reflect on what has been learned.

Feedback

This guide is being continually being updated to reflect experiences and best practices. Please e-mail Hannah.Wheatley@CIVICUS.org to learn of updates and submit experiences about this guide.

SAMPLE TEMPLATES

The following section includes sample templates for the following survey items:

- Response Reflection
- Randomly selecting participants
- Calculating Benchmark for Phone Response
- Requesting the Phone Interview
- Scheduling the Phone Interview
- Phone Interview Reminder
- Phone Survey Feedback
- Survey Capture Form

Response Reflection

Prior to conducting the phone interviews, have those that participated in the event write responses to the the following questions before starting the phone surveys.

What percentage of the asked do you expect to agree to the survey?

What kind of themes to you expect to see in the responses around the event?

What kind of improvements do you think will be suggested?

After conducting the phone interview, have those that conducted the interviews and participated in the event write down responses to the following.

What percentage agreed to the phone interview? Was this higher or lower than expected? Does the percentage suggest in terms of the event and our relationship with the participants?

What themes emerged that we were expecting?

What themes emerged that surprised us?

What actions can we take based on this feedback?

Based on who responses, who else may we need to speak to? Are we likely missing an important feedback by not speaking to individuals and organisations that chose not to attend?

Randomly Selecting Participants to Survey

A complete list of participants are needed for this technique.

Use a free online service to generate the needed number of randomized numbers, see <https://www.randomizer.org/>

Match the selected numbers from the randomizer to the individuals in the complete participant list. A rule of thumb would be to generate 30% more numbers than interviews you want to complete as some e-mails will likely bounce and others will not agree to the survey.

Calculating Benchmark % for Phone Response

Number of those agreeing to the phone survey _____

Total number of phone survey requests _____

Benchmark % (Number individuals agreed **divided by** Total individuals requested)

_____ Reflections of benchmark percentage (What does the percentage suggest about the event? If available, how does it compare to other survey requests?)

Any additional reflections on phone survey request

Benchmark %*

- ◇ Less than 50% agree to the phone survey: A red flag to invest more effort into investigating the root causes of the apathy.
- ◇ Between 50 – 80% agree to the phone survey: Indicators moderate connection with the registered beneficiaries. Investigate what is most valued to increase success to the next level.
- ◇ Above 80% agree to the phone survey: Excellent indication that a strong relationship has been built with the beneficiaries. Investigate how to continue success.

*These percentages are only suggestions. Please consider your situation and adjust accordingly.

Requesting the Phone Interview

Dear Ari,

Greetings from the International Civil Society Week (ICSW) team. Our records show you registered for ICSW 2017. We would like to hear about your ICSW 2017 experience and listen to your suggestions about how to improve.

Would you be available for a 15 – 20 minute call next week? If so, please provide your preferred phone number and/or Skype ID.

Warm regards,
Hannah

ICSW team member

Scheduling the Phone Interview

Dear Ari,

Thank you for agreeing to speak about International Civil Society Week 2017. We will ask a few questions about your experience, and your feedback will help us make decisions to improve the programme. You can find examples of the questions below.

Please click on the following link (<https://calendly.com/hannah-wheatley/30min>) to set-up a 30-minute feedback session with Hannah between next week on Wednesday, Thursday or Friday (Nov 22-24). If you have difficulty using the link, write to her directly at Hannah.Wheatley@CIVICUS.org.

Only CIVICUS staff will have access to the results, and you may request for your name and comments to be anonymous. After we have completed the surveys, we will share the insights and what we are doing with those insights with by e-mail within six weeks.

Looking forward to speaking to you soon,
Hannah

Example Questions about International Civil Society Week (ICSW) 2017

- 1) Please tell me about your role around the [name of the event].
- 2) Please tell me about your experience with the event.
- 3) Have you recommended the event to others? Why or why not?
- 4) Please tell me a moment that surprised you about the event?
- 5) What else should we know about improving the next event?

Phone Interview Reminder

The day before the proposed call, send out a reminder e-mail.

Dear Ari,

I am looking forward to speaking to you tomorrow at 1:00PM GMT+3. I will call you on Skype, and if the connection is poor, I will call you on +255.68.234.3356. If we have any difficulties connection, please reach out to me on my mobile or WhatsApp number +45.67.875.4233.

To improve the quality of our call, please try to be in a quiet location. If available, we find using headphones and microphone is also recommended.

Warm regards,
Hannah

Phone Survey Feedback

Within six weeks of the interview date, send out an e-mail describing the survey process, insights and actions being taken.

Dear Ari,

Thank you for sharing with us your experiences. After speaking to several participants, we found that nearly everyone benefited from the event, but we can do better at having more global south speakers. We also found that the most valuable aspect of the event was the time spent with peers. Based on this feedback, we will be asking more detailed questions about how we can best facilitate these peer interactions at our next event.

If you think our analysis is missing a critical aspect or wrong, please let us know.

Thank you again for taking time and speaking with us. We hope our survey process reflects our commitment our participants.

Warm regards,
Hannah

Survey Capture Form

Unique Survey ID:
Interviewer ID:

Date of Survey:

Time began:

Time ended:

Total survey duration:

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Enumerator section – Complete after the Survey

Overall comments about how the process went (setting up the meeting, mood during the meeting, location of the meeting)

Overall impression of the responses (questions too hard to answer, required lots of probing, openness of the responses)

Insights from this interview (What was surprising? What confirms with previous assumptions?)

Possible recommendations based on this interview (What does this suggest might be possible approaches for continuing this work?)