

PolicyInteractive Survey Methodology Description

PI uses several forms of opinion surveying. These are:

- Random Digit Dial Telephone Surveying using a questionnaire template read by an operator.
- Internet surveying of respondents drawn from a random selection process using a questionnaire read and completed by a respondent on their computer.
- Personal interviews with targeted audiences using a survey questionnaire.
- Informal exploratory discussions with random citizens on subjects of topical interest

Done properly, “[t]he foremost advantage of the sample survey technique ... is the ability to generalize about an entire population by drawing inferences based on data drawn from a small portion of that population.”¹ Key to acquiring good information from the generalized population is:

- Random selection of the persons to be interviewed.
- Quantity of people sufficient to give a valid statistical cross section of the population
- Representativeness of the sample across pre-determined demographic sectors in proportion to the known demography of the whole population, in categories like:
 - Age
 - Gender
 - Geography
 - Income

I. Informal Interview Methodology: This technique is not intended to be statistically relevant; it is used primarily to obtain insights from strangers about social issues for exploring general question design development. By testing a draft questionnaire on persons who are approachable at random, such as a service station, mall setting, or happenstance coincidence meeting, insights are obtained about relativity of importance of issues, possible language commonly used around those issues, and other discoveries of interest.

II. Random Telephone Survey Methodology is a complex subject and will only be discussed superficially here. The sequence of events for PI to conduct a valid survey involves:

- An initial statement of purpose for a survey is drawn up as a guide for the survey design.
- Based on findings in public acceptance of a cold-call survey, telephone survey time length aim is 10 – 12 minutes.
- Initial drafting of a survey instrument. Four main question objectives are in each survey:
 - Obtain insights about the relative importance of key social issues in people’s lives.
 - Measure levels of support for specific policy options or cultural objectives.
 - Seek insights about people’s values, dispositions and behaviors.
 - Obtain demographic background about the sample – where they live, age, gender, income, religion views, political views.
- Circulate draft internally and to outside reviewers for critique and editing. It is common to undergo ten to fifteen edits on a survey.
- At several points when the survey tool is deemed testable, run a series of trial telephone tests with persons who are solicited to take the survey. We try to test on people who have not had prior experience with our research. Besides testing for time and clarity, we obtain feedback

¹ Louis Rea & Richard Parker; Designing and Conducting Survey Research, 2005.

from the respondent as to whether there is a perception of bias or 'agenda' in the survey. We don't profess to always ask neutral sounding questions, but if there is imbalance in a question there is a counter-balance in an adjoining question.

- Much effort is applied to insure the survey is not leading or priming the respondent to a predetermined response (push-polling). Professional and trained survey writers either volunteer or are paid to review the instrument and be involved in the on-going drafting of the survey instrument.
- A professional telephone call center is selected to field the survey. Items relevant to selection are:
 - Ethical standards, confidentiality, and reputation of the company
 - Competency of the operators who will make the calls
 - Diction & verbal clarity
 - Capacity to understand and respond to the rules of the survey method
 - Data management capacity of the company
 - Timeliness to begin and complete the survey on schedule
 - Price
- Contract is drawn stipulating key performance criteria and schedule is established.
 - Survey instrument is delivered to contractor.
 - Contractor time-tests the instrument internally with several operators and provides final price estimate based on timing.
 - Training session with all operators occurs, with PI staff present, for full understanding of all survey items. Small alterations in the survey instrument often occur in this stage.
- Survey calling is undertaken
 - Survey fielding commences at a specific time, and is scheduled for a 10 day period including two weekends. Valid phone numbers not answered are called back a minimum of five times (at varying times) to avoid interviewing only in-house types.
 - PI staff randomly monitors the operators for clarity of survey implementation, each operator at least once. Observations or request for operator retraining on any item of substance is forwarded to the supervising operator.
 - Pause at the 10-20% response point occurs while PI evaluates the first preliminary data. Rarely, a problem may be apparent either from the random monitoring, for operator feed-back, or in data examination. For example, an item with unusually high refusal or "don't know" response may result in an alteration of an item to improve useable response, or an item may simply be dropped.
 - Survey resumes and is run over a number of days until 75-80% sample is complete. A slight pause occurs in data gathering and data is evaluated for demographic representativeness of the full population, in areas of age, gender and geographic distribution. Adjustments in sample solicitations are made to obtain good representativeness, such as closing off calling into a geographic area which is over represented.
- Survey is completed and completed data files are transferred to PI from the contractor.
 - Initial data is evaluated and transferred into legible discussion formats.
 - Demographics are evaluated and compared to known state characteristics. Results give confidence that samples are true Oregon representations.
- Survey data is evaluated in detail by PI staff and reports are sent to outside peer reviewers for comments, questions and suggestions.

- Results are consolidated into presentation format of individual surveys and written reports of significant findings.

III. Personal Detailed Interviewing: RDD telephone surveys discussed above are necessarily short and survey designs are generally multiple choice type answers to be efficient of resources and time. Respondents can give unintentional or intentional misleading or spurious answers and volunteered or open responses are limited. Personal interviewing of respondents in a more open-ended format opens up a wide range of opportunities to pursue questions or issues of interest. PI's random telephone surveys typically end with a "recruit" question where the respondent is asked permission for a researcher to return a call sometime in the future. Affirmative response to our recruit question is always above 80%, indicating that the respondent has likely formed an opinion that the just completed telephone survey research is worthy of their continued time.

Personal Interviewing involves:

- Develop a survey statement of purpose
- Selecting a target group.
 - Drawn from random phone interviews
 - Drawn from researcher selection lists
- Design a survey instrument – generally follows the method described under II above.
- Field the instrument. In personal interviews, PI has used its own in-house employees to do the interviewing. Generally the respondent list is divided into equal segments and each researcher is assigned a group of potential respondents. Because of inability to reach each respondent on the list in a timely or effective manner, the list must generally be at least 50% larger than the end number of successful contacts.
- Manage the file data on the interviews.
 - Recorded data files
 - Data transfer into spreadsheet file format
 - Data transferred into written formats.
 - Confidentiality quality control.
- Analyze the findings.

IV. Internet Surveying: PI has not collected data at this point using the internet but has an approaching opportunity to do so. A description of the methodology will be elaborated at the time this method is undertaken.