



Get Inside Into Your Students' Heads: Common-Sense Assessment Techniques

ACUI Webcast

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Core Premises/Learning Objectives

- ◆ Focus on practical aspects of collecting audience feedback.
- ◆ Builds on past programs regarding planning and developing outcomes.
- ◆ Share core principles of knowledge management and program evaluation.
- ◆ Demonstrate how research results contribute to decisions and data-driven strategies.

How to Identify and Address Information Needs

- What do you need to know today depends ...
 - ◆ On what you are doing
 - ◆ On where you plan to go
 - ◆ On what has happened before
 - ◆ On how you handle and process information internally

- To help identify your information needs, helpful to ask:
 - ◆ Regarding any recent decision we have made, what facts or inference did we rely on to come to that conclusion?
 - ◆ Looking into the future, what management issues do we face?
 - ◆ What does our short list of solutions/actions look like?
 - ◆ Working backwards, what information might we need to provide better decision support—and perhaps gain knowledge that expands our perspective?



Elements of a Research Agenda/Program

- Often we encourage thinking of research as a process and a program, rather than a project
 - ◆ Successful data collection methods yield regular insights
 - ◆ Program should mix methods of administration, specific audiences
 - ◆ Should be able to conduct internally, at low cost and using skilled staff/student resources
- Generally an agenda should be:
 - ◆ Multi-year in focus, several activities per year
 - ◆ Include communications back to the audience—two way dialogue
 - ◆ Mix of very targeted projects and the large scale “check-in” or global needs assessment



Developing A Data Collection/Research Agenda

- Structure: number/types of methods you integrate
 - Surveys, focus groups, interviews, secondary analysis
 - User groups, planning sessions, “town halls,” Delphis
- Define your knowledge goals:
 - Opinions, perceptions, trends, differences across segments, externalities (competition/issues)
 - Desired outcomes: decision support, feasibility, simple data collection (incidence/prevalence), profiling
- Determine frequency
 - Relate it to timeliness of need, respondent fatigue
 - Avoid proxy for action (study instead of acting!)
 - Convert into a relationship tool
 - Demonstrate transparency, guide program launches
 - Integrate with membership/communications strategy



Conducting a Very First Research Project

- Some tips if you (or your department) are conducting research for the first time:
 - ◆ Be transparent—invite feedback from any/all departments
 - ◆ Encourage student government to weigh in on information needs
 - ◆ Be a firm “traffic cop”—be clear up-front you will consider but are not required to act on ideas
- Once all ideas are compiled
 - ◆ Organize, categorize, prioritize
 - ◆ Keep one of a group of questions that feel similar/redundant
 - ◆ Provide parties with an outline and an analysis plan



Illustration: General Student User Evaluation

- Current scenario:
 - ◆ Enrollment is up, but student traffic in union is down
 - ◆ Group of students has held mini-protest, paper runs editorials
- Probable research goals:
 - ◆ Develop a baseline for student satisfaction with union
 - ◆ Measure short term changes in perceptions & behavior
 - ◆ Project future patterns of behavior based on current findings
 - ◆ Collect data that can be used to help educate student leaders, colleagues in administration
- Analysis/knowledge management
 - ◆ Conduct research addressing short-term concerns but re-access over time to educate audiences, support future decisions



Topical Areas You May Want to Measure/Assess

- Readership of your printed collateral, website
- Quality and factors driving the new member experience
- Cultural sensitivity (e.g., a special focus on international)
- Exploring stronger relations with student leadership, etc.
- Probing into a current controversy
- Measuring acceptance/concerns with facilities management (remodeling, etc.)
- Measuring staff/customer service quality
- Gap analysis: importance vs. satisfaction



Decisions that Need Data

Many areas ...

- Staff: up/down
- Programs: more/less
- Do something new/
drop something old
- Take a position or do
nothing
- Evaluate programs:
sunset or expand
- Assess new services

Applications: plans/initiatives

- Alter the bundle of member services
- Change focus, justify actions with
less member/leader fallout
- Become more tailored
- Address underserved markets
- Cut budgets/reprogram resources
- Demonstrate responsiveness, be
dynamic in the face of change
- Optimize “the business of the
association”



Choosing the Right Methodology/Approach

- By this stage: need to determine which methods to use:
- Qualitative research: focus groups, phone interviews, face-to-face
 - ◆ Open-ended methods—using a guide but two-way dialogue
 - ◆ Free to digress and go into unexpected areas
 - ◆ Not fully projectable
- Quantitative surveys
 - ◆ Mostly closed-ended questions
 - ◆ No flexibility once launched
 - ◆ Samples vs. census
 - ◆ Formats: online, print, telephone
 - ◆ Sequence of mailings/reminders
 - ◆ Projectable, but test for response bias: unrepresentative results
 - ◆ Premiums/incentive for response
 - ◆ Length/format of instrument



Strengths: Quantitative vs. Qualitative

- Quantitative=*what* (hard and fast facts)

“32% strongly agree that x Union is the best place to spend time on campus”

- ◆ Offers great flexibility for analysis: comparing across questions
- ◆ Database programs allow for cross-tabulations by segment
- ◆ Can run more sophisticated analysis such as ANOVA or multiple regression using SPSS or SAS (helpful in academia!)

- Qualitative=*how* and *why* (context and vignettes)

“Non-traditional students find visiting the Union inconvenient and would welcome more encouragement in their first year.”

- ◆ Generally anecdotal, helps in telling stories and explaining some observed trends or survey findings



Key Steps in Qualitative Research

Plan

- Define objectives: identify unmet information needs, collect dangling hypotheses, poll stakeholders.

Guide

- Draft series of core questions, sub-questions or probes, ground rules and introductory language. Review guide for completeness, reasonableness, flexibility and length. Vary by audience.

Sample

- Identify a pool of appropriate participants. Ensure a mix for interviews, in terms of demographics and engagement profile (leaders and rank-and-file). Ensure homogeneity for focus groups when helpful to encourage candid conversation.

Recruit

- Draft invitations, record confirmations, do reminders/other followup with desirable non-respondents to yield representative group.

Conduct

- At scheduled interview time or focus group time/location, manage the session. Interviews are often 30 minutes, focus groups 90.

Analyze

- Transcribe the sessions if possible, then categorize by primary themes, pull call-out quotes. Seek to explain some findings in terms of demographics, other causal factors.

Report

- Write a report/presentation that summarizes overall findings including additional questions that inevitably arise.



Key Steps in Quantitative Surveys

Plan

- Define objectives: Clarify unmet information needs, prioritize hypotheses to test, reconfirm with stakeholders.

Draft

- Hire or assign task: write questions and response items, compile and prioritize vis a vis final objectives.

Design

- Once reviewed, select software, convert questions to its format.

Pre-test

- Draft invitation and reminder language, and administer with small, randomly-selected group selected from your sample or census.

Administer

- Once any appropriate improvements have been made, load address book and transmit personalized invitations and reminders on a set 7-10 day schedule.

Download

- Run some statistics from the survey software, then download all data including closed ended data for coding/cleaning and open-text responses to convert to a document.

Analyze

- Run cross-tabulations on values such as institutional characteristics (size, type), demographics, predicted behaviors, source, satisfaction level & related attitudes.

Report

- Write a report that summarizes overall findings, discusses meaningful differences by segment, embeds graphics, categorized comments and cross-tabulations.



Avoiding Common Data Collection Mistakes

- 1) **Wrong focus**: Too much emphasis on the periodic, global “needs assessment,” not regular work, specific applications.
- 2) **Fieldwork**: Populist Census rather than a sample. Undifferentiated forms/surveys by audience. Inadequate campaign management.
- 3) **Response management**: Unclear thought on (in)tangible incentives. Accepting chronic low participation.
- 4) **Communications**: Not sharing results in a transparent manner. “What’s in it for the respondent” is being part of the process.
- 5) **Surface level analysis**: Weak conclusions err on side of being “objective”/looking at trees, not forest. Little consideration of bias.
- 6) **Interpretation**: Be receptive to bad news. Focus on actionability. Internal approach to mine details or reject counterintuitive findings.
- 7) **Shelf life**: Insufficient use of the study after first presentation: not retaining data for ongoing application, foundation for new studies.

Sample Questions (Rough Start)

- **Please indicate your satisfaction with the following aspects of the Union (5-1 scale):**

Extremely Satisfied Not at all Satisfied

- ◆ Overall quality of facilities
 - ◆ Range of options available through food service
 - ◆ Fun/entertainment value of visiting the union
 - ◆ Ease of access from my residence
- **How frequently do you visit the Union in an average month to:**
At least daily/2-3 times a week/weekly/monthly
 - ◆ Visit the Campus Bookstore baseline for student satisfaction with union
 - ◆ Use the dining facilities
 - ◆ Wait for the campus shuttle
 - ◆ To meet with friends for casual purposes
 - ◆ To study alone or with others



Developing an Analysis Plan

- Great optional tool for managing expectations
 - ◆ Supplements your draft survey/guide
 - ◆ Explains why you ask certain questions
 - ◆ Explains why you don't ask certain questions
 - When possible, identify good questions that you'll ask later, in another research project
 - Be honest in identifying questions you won't ask (with reasons)
 - ◆ Outline how you will analyze findings
 - Tie in with cross-tabulations by audience segment
 - Relate certain questions to other questions



Online Quantitative Survey Tools

Use a good online tool

Low-end often as good as high-end

- SM: campaign mgt easy segments, filtering/crosstabs

- At \$200/yr, fraction of cost of slightly fancier tools

- Often others generate lower response

- In-house allows serialized studies

- Focus on need & application, not tool or method

SurveyMonkey - My Surveys - Windows Internet Explorer

http://www.surveymonkey.com/MySurveys.aspx

SurveyMonkey.com because knowledge is everything

Logged in as "info@kwhorton.com" Log Off

Home Create Survey My Surveys Address Book My Account Help Center

Current Folder: -- View All Surveys -- Manage Folders Title Search: Search

Survey Title [sort]	Created [sort]	Modified [sort]	Design	Collect	Analyze [sort]	Clear	Delete
CLARB Candidates Final	Tue, 1/13/09 8:09 AM	7 hours ago			305		
CLARB Council Record Holders final	Tue, 1/13/09 8:23 AM	7 hours ago			618		
CLARB MBE	Wed, 12/24/08 8:16 AM	11 hours ago			47		
CLARB Candidates	Wed, 12/24/08 8:42 AM	2 days ago			23		
Short Survey	Wed, 12/31/08 6:58 AM	2 days ago			343		
CLARB Council Record Holders	Wed, 12/24/08 12:40 PM	6 days ago			10		
2007 Health Benefits Survey	Sun, 12/17/06 6:09 PM	9 days ago			826		
State of the Art Evaluation	Tue, 11/4/08 4:28 AM	59 days ago			21		
IPC Member Survey	Fri, 9/26/08 1:48 PM	92 days ago			162		
IPC Non-Member Survey	Fri, 9/26/08 2:14 PM	97 days ago			93		



Projectability: From Findings to Audience Measures

- This concept is critical in interpreting research
 - ◆ How do you define your overall audience?
 - ◆ Example: 10,000 total students
 - ◆ Demographics: 55% female, 45% male; 15% Hispanic/Latino, 10% African American, 10% Asian-American, 65% Caucasian
 - ◆ Class/age: x% seniors, x% non-traditional
 - ◆ Traffic: estimated headcount for specific functions within union
 - ◆ External audiences: x# non-student community members
- Ensure your sampling covers key segments
 - ◆ Sometimes over-sample if methodology/audience may not encourage similar response rates across clusters
 - ◆ Always important to look at responses by segment to understand the whole



Sampling: Choosing the Right Audience

- Select a random sample of members; avoid “convenience sampling”
 - ◆ Consciously supplement insights from committees/advisory bodies
 - ◆ In most nonprofit settings, leaders generally speak for but are not actually representative of the student body
 - ◆ Often these groups are inclusive/diverse, but psychologically ... more motivated to be involved, driven by visibility
 - ◆ Other mental states (apathetic/indifferent) rarely represented
 - ◆ Sample and encourage full participation in sufficient numbers
- Why do we care?
 - ◆ Our actions (& decisions) should focus on our full audience
 - ◆ Growth and achievement may hinge on reaching new audiences, converting the inactive to active, inspiring passion



Communications: Sharing Your Findings

- ◆ Important: students won't think you act if you don't share
 - Internally with committees/leaders in detail
 - Publicly in less detail through publications, forums, social media sites
 - Avoids any impression of “cover-ups”
 - Often, frame findings to “face the future”/“see around corners”
 - Put data into context: how does it compare to other things learned
 - Over time, effective communication boosts response rates
 - Best incentive you can offer—make them part of the process
 - Creates expectation that they'll participate in future
 - Helps “train” incoming students/classes through WOM



Methods of Reporting: Helping Audiences Read

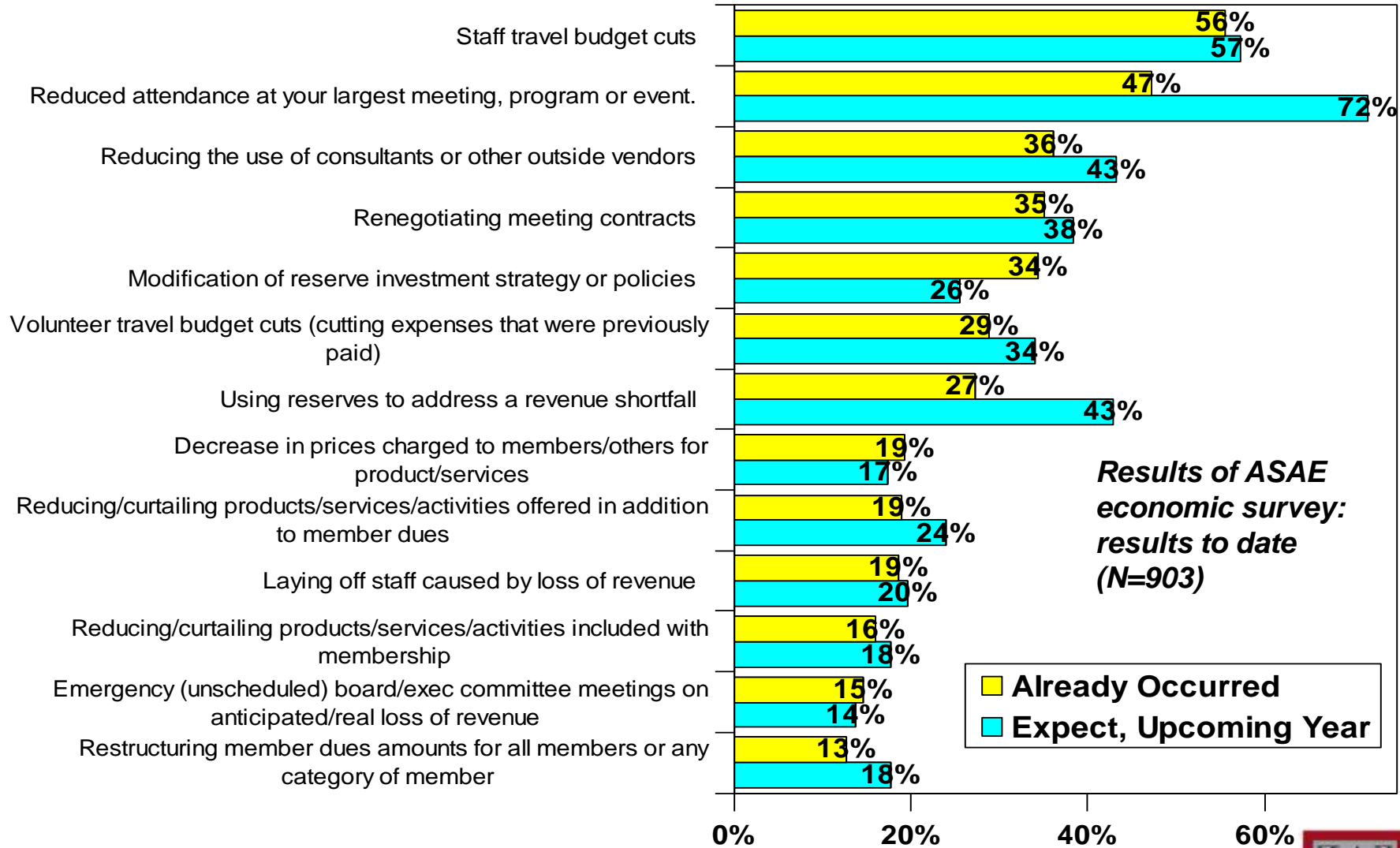
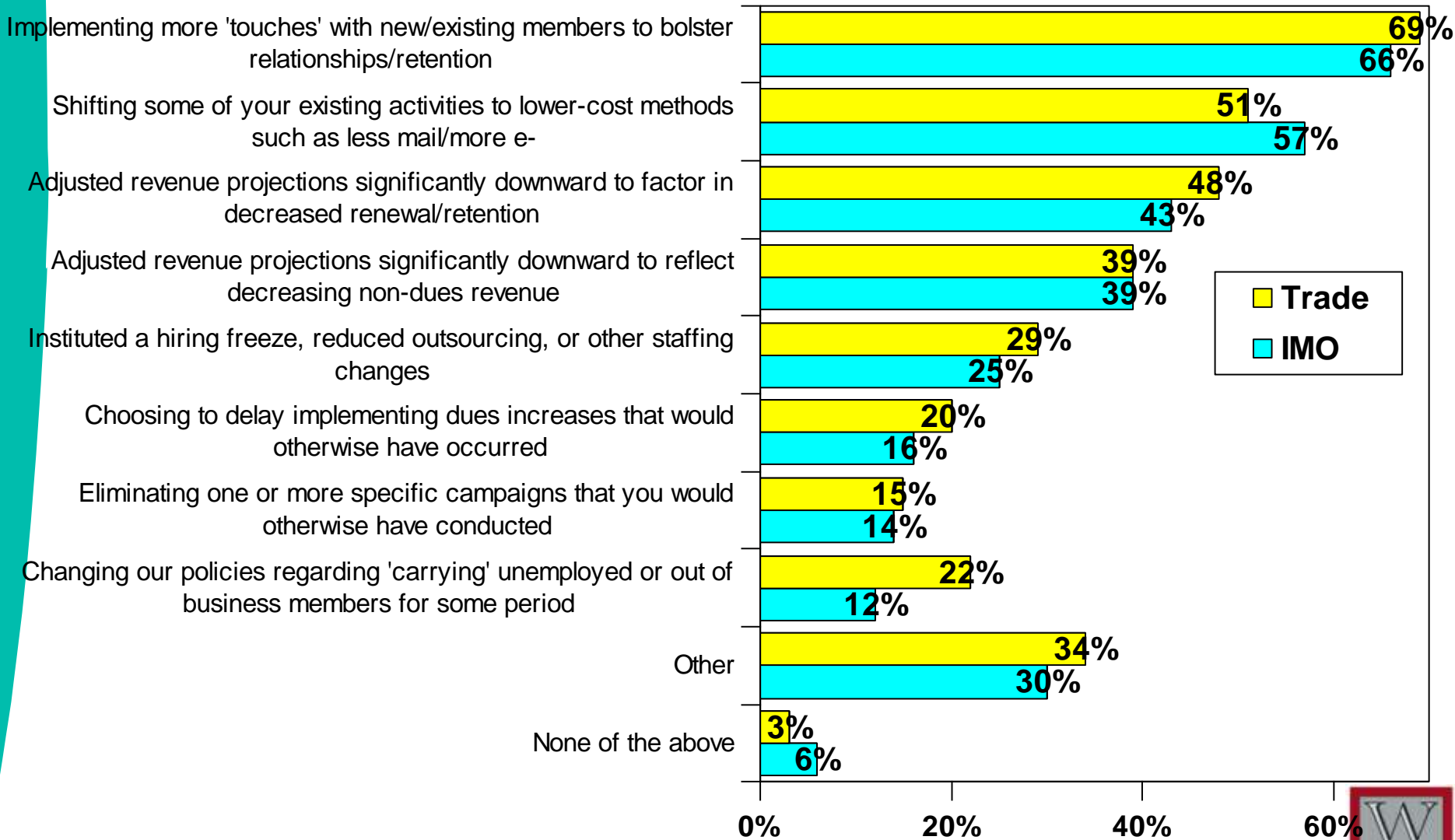


Illustration: Consensus on Actions Taken or Planning to Take to Address Environment



Conclusion/Thank You!

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