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

ACUI Webcast

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Introduction

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 mixes 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

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- **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:

- <u>Qualitative research</u>: 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

- <u>Quantitative surveys</u>
  - ◆ 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) **<u>Wrong focus</u>**: Too much emphasis on the periodic, global "needs assessment," not regular work, specific applications.

2) **<u>Fieldwork</u>**: Populist Census rather than a sample. Undifferentiated forms/surveys by audience. Inadequate campaign management.

3) **<u>Response management</u>**: Unclear thought on (in)tangible incentives. Accepting chronic low participation.

4) **<u>Communications</u>**: Not sharing results in a transparent manner. "What's in it for the respondent" is being part of the process.

5) **<u>Surface level analysis</u>**: Weak conclusions err on side of being "objective"/looking at trees, not forest. Little consideration of bias.

6) **<u>Interpretation</u>**: Be receptive to bad news. Focus on actionability. Internal approach to mine details or reject counterintuitive findings.

7) **<u>Shelf life</u>**: 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

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

Chart showing percentages for "Already Occurred" (yellow) and "Expect, Upcoming Year" (cyan):

Category	Already Occurred	Expect, Upcoming Year
Staff travel budget cuts	56%	57%
Reduced attendance at your largest meeting, program or event.	47%	72%
Reducing the use of consultants or other outside vendors	36%	43%
Renegotiating meeting contracts	35%	38%
Modification of reserve investment strategy or policies	34%	26%
Volunteer travel budget cuts (cutting expenses that were previously paid)	29%	34%
Using reserves to address a revenue shortfall	27%	43%
Decrease in prices charged to members/others for product/services	19%	17%
Reducing/curtailing products/services/activities offered in addition to member dues	19%	24%
Laying off staff caused by loss of revenue	19%	20%
Reducing/curtailing products/services/activities included with membership	16%	18%
Emergency (unscheduled) board/exec committee meetings on anticipated/real loss of revenue	15%	14%
Restructuring member dues amounts for all members or any category of member	13%	18%

Results of ASAE economic survey: results to date (N=903)

Legend:
- □ Already Occurred (yellow)
- □ Expect, Upcoming Year (cyan)

X-axis: 0%, 20%, 40%, 60%

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

Implementing more 'touches' with new/existing members to bolster relationships/retention — Trade: 69%, IMO: 66%

Shifting some of your existing activities to lower-cost methods such as less mail/more e- — Trade: 51%, IMO: 57%

Adjusted revenue projections significantly downward to factor in decreased renewal/retention — Trade: 48%, IMO: 43%

Adjusted revenue projections significantly downward to reflect decreasing non-dues revenue — Trade: 39%, IMO: 39%

Instituted a hiring freeze, reduced outsourcing, or other staffing changes — Trade: 29%, IMO: 25%

Choosing to delay implementing dues increases that would otherwise have occurred — Trade: 20%, IMO: 16%

Eliminating one or more specific campaigns that you would otherwise have conducted — Trade: 15%, IMO: 14%

Changing our policies regarding 'carrying' unemployed or out of business members for some period — Trade: 22%, IMO: 12%

Other — Trade: 34%, IMO: 30%

None of the above — Trade: 3%, IMO: 6%

Legend: Trade, IMO

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Conclusion/Thank You!

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