

GUIDELINES FOR CONDUCTING A SURVEY

THE OSHER LIFELONG LEARNING INSTITUTE AT RIT

If an Osher committee chair or course leader wishes to survey the membership to learn more about member attitudes, opinions, or experiences, they can sponsor a membership survey. Members with email access will receive the survey electronically while hard copies will be available to those without email access. The survey will be optional and all responses will be anonymous.

OVERVIEW OF THE BASIC STEPS NEEDED FOR OBTAINING OSHER SURVEY RESULTS

1. An Osher committee or course leader (“Originator”) submits a proposal to the Survey Committee, utilizing the Survey Proposal Form.
2. The Survey Committee reviews and approves the general nature of the desired survey.
3. The Survey Committee translates the approved proposal into a properly formatted survey.
 - a. The Survey Committee will use the services of an online survey-collection firm.
 - b. The first draft of the formatted survey is shown to the Originator for suggested revisions and approval.
4. The survey is pre-tested by five-to-ten Osher members, who may identify additional areas of improvement.
5. After final approval by the Originator and the Survey Committee, a link to the survey is then emailed to all Osher members who have email access. Members click on the provided link to access and complete the survey.
6. An announcement of a current survey will be posted on the bulletin board and included in the Osher Daily Announcements. Members without access to email may pick up a hard copy at Osher, complete it, and return to the office for manual entry.
7. The survey-collection firm collects the data, anonymously, and provides Osher with results.
8. Detailed summaries of results will be distributed to the Originator from the Survey Committee. Following review, the Originator and Survey Committee will agree upon a summary statement for distribution to the appropriate audiences. In most cases, this audience will be the general membership and the information will be published in *Osher News and Events*.

GUIDELINES FOR CREATING A SURVEY

Surveys can be very powerful and useful research tools. But if the survey is badly constructed, then the results will be invalid, biased, misleading, or useless. The guidelines below will help in the creation of a survey that provides valuable information.

INITIAL PLANNING

1. Plan ahead. Surveys may take a month or more to develop, depending on the complexity and format. Determine the deadline for reporting the data the survey will collect.
2. The first step in any survey is to determine its goals. What do you want to know? What are the issues, questions, ideas, problems that you want to better understand. The answer to these questions will determine what you will ask and how you will ask it. The more specific you make your goals, the easier it will be to get usable answers.
 - a. At this step, you may need to limit the scope of the survey. After figuring out exactly what you need to learn from the survey, you may want to rate the information as “need to know” and “nice to know.” Surveys with between six and eight questions tend to get the highest response rates.
 - b. You must know what you plan on doing with the data. Based on the goals of the study, identify the questions you want the data to answer. Think about whether you are interested in learning about members’ opinions, experiences, or attitudes. If the answer to a particular question won’t or can’t change your action, don’t ask it! The data you need will form the foundation of the survey form.

3. Identify the people from whom you will gather the data. Do your questions relate to the entire membership, members enrolled in a particular class, or other subsets of the total membership? Specify the “target audience.”
4. When do you need the information from the survey? Before a certain event? After an event?

HOW TO COMPLETE THE SURVEY REQUEST FORM

1. Compose a title, e.g., “Osher Travel Survey.”
2. Write a short introduction, outlining the survey’s purpose, the topics being covered, and how the results will be used. You will want to include reassurance that the responses will be anonymous, with no information being identified as coming from a specific person.
3. Be as specific as possible on the questions you want asked. For example, the Travel Committee’s overall goal may be to “add to the enjoyment of Osher members, while adding value to membership.” With that in mind, specific questions might include:
 - a. How satisfied are you with the current travel options?
 - b. How long would you like to travel?
 - c. How much are you willing to pay for a trip?
4. Identify your desired audience. If not the total membership, what subgroup do you wish to reach?
5. Identify the timing. Do you have a deadline for the survey results?
6. List the Originator’s name and contact information for the Survey Committee.

NEXT STEPS

1. The Survey Committee creates a draft of the proposed survey and submits it to the Originator, along with a draft statement to introduce the survey.
2. The Originator reviews the statement for accuracy and to assure that it captures the overall purpose. Once approved, the survey is prepared for distribution by an outside vendor.
3. The survey is pre-tested by a small group prior to general distribution. Recommended changes are made and the survey is distributed by the outside vendor and hard copies made available at the Osher front desk.
4. After the initial survey is distributed, reminders can help to increase the response rate and may be sent out in one-week intervals by the vendor. Results are collected by the vendor and analyzed by the Survey Committee. The summary will be shared with the Originator and then distributed to Osher members.