SURVEY BASICS

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Survey says...

Tell us about the last survey you participated in.

- Was it what you expected?
- Was your privacy respected?
- Did you receive the results?
- What were the next steps? What was the impact?

Surveys are:

A survey is a method of gathering information from a sample of individuals. Surveys are done to inform planning and decision-making.

There are many types of surveys. For example, a survey can include questionnaires or interviews to measure characteristics and/or attitudes of people. They can include qualitative and quantitative data.

Planning Considerations

- Resources and appropriate timelines available to collect, analyze and use the data appropriately.
- Plan for processing the data
- Types of tools used to collect the data. Online/Offline survey?
- Is the methodology appropriate? Ethical? Data Privacy by Design? Minimization?
- Is the content appropriate?
- Are participants engaged in planning?

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Community/Audiences Considerations

- Audience/Planning outputs defined
- Key informants engaged
- Testing and Outreach planning
- Consent obtained for fair use?
- Vulnerability assessed/Survey Literacy?
- Do participants have access to respond
- Saturation/Fatigue/Duplication
- Feedback loops for communities included?

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Example of a Survey Design Plan (1)

	Survey Timeframe		
Survey Management Team (SMT):			
Survey Team:			
Timing	**Activity**	**Responsibility**	**Deliverable**
1 week	• Appoint a survey management team • Confirm budget available for survey. • Review and finalize TOR • Create dropbox for sharing background documents with survey team. • Prepare draft timeline for survey process.		Survey management team selected Approved budget available for survey ToR finalized and approved Dropbox created Draft Timeline
2 weeks	• Advertise ToR on several listservs (ALNAP, XCeval, MandE) to solicit applications for the survey team positions.		Advertised ToR
1 week	• Shortlist/interview candidates and contracting of survey team		Survey team selected and hired
1 week	• Survey consultants prepare inception report: include the proposed methodologies, data collection and reporting plans with draft data collection tools such as interview guides, the allocation of roles and responsibilities within the team, a timeframe with firm dates for deliverables, and the travel and logistical arrangements for the team.		Inception report

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Example of a Survey Design Plan (2)

1 week	• Data collection		Data collected via method most appropriate for field context Data monitoring and cleaning
2 weeks	• Analysis and draft report		Draft report
1 week	• Debriefing with relevant stakeholders to check accuracy of data and gather further feedback from participants		Input from relevant stakeholders
1 week	• Relevant stakeholders review draft report		Any feedback sent on draft report
1 week	• Survey consultants incorporate comments and prepare final report *(this marks the end of the work for the survey team)*		Final report
1 week	• Final report is approved by relevant Management. If an IFRC secretariat-supported survey, it should be published on the IFRC Evaluation database. Go to: http://www.ifrc.org/en/publications-and-reports/evaluations/		Approved final report and payment of survey consultants

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Data Protection, Ethics, and Privacy by Design

- Rights of participants

- Protection from harm

- Collaborating with respondents

- Interviews guided by ethical responsibilities

Engaging Participants

Community engagement should be inclusive. Organizations are accountable and transparent.

Context
- Explain the purpose of the survey, length and roles
- Provide details on the organization
- Explain how the information will be used

Informed Consent
- Identify and discuss privacy considerations and risks
- Obtain informed consent before proceeding
- Participation is voluntary, questions may be optional

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Data Protection

Every project should be build with principles of privacy by design and protection from harm.

- Plan to collect only the data necessary to deliver the project goals.
- Curate Aggregated responses. Be aware that smaller samples in some contexts can be 'disaggregated' potentially causing harm.
- Be clear who has access to the data with clear roles, responsibilities, and procedures.
- All people engaged in the project are committed to confidentiality of participants and ensuring protection from hard.

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Be Ethical

Often people designing the survey may not be the interviewers:

- Plan for privacy and safety of the participant (respondents)
- Plan for the safety of the interviewers
- Train the interviewers on the best practices

Data managers may not be the same people who designed or conducted the survey:

- Instill privacy by design and responsible data use into all the information workflows.
- Provide context to inform the analysis and outputs.

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THANK YOU

PMER Handbook

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