

Survey Guide













WHAT:

- Tool used to ask questions of a group of individuals that may come from a similar or diverse population.
- Questions can be qualitative or quantitative.
- Can be combined with focus groups or interviews or other evaluation methods to collect more data.

WHY:

- Enables the evaluator to collect data on many participants in a short period of time.
- Combines written and verbal feedback while allowing an asynchronous platform for greater engagement and accessibility.

HOW:

 Determine the goals of the survey.	 Pilot the survey with the participant group you intend to survey, and make any edits based on their feedback.
 Identify the participant selection strategy.	 Put the most important questions at the top.
 Design the survey collaboratively with participants in the target demographic, and/or share the draft for feedback.	 Keep the survey as short as possible.
 Determine survey format (i.e. web-based, pencil/paper, email).	 Do not ask demographic questions unless they are necessary for your survey goals.
 If applicable, review publicly available valid and reliable questions on key topics. Try searching for keywords.	 Clarify how decisions/results will be shared with participants after the surveys are done.



OPTIONS TO EMBED EVALUATION:

Level of Engagement	Key PPCE Activities	Options to Embed Evaluation	Analysis
Inform	<ul style="list-style-type: none"> • Leaflets, posters, other informational items • Social media postings 	<ul style="list-style-type: none"> • QR code on flyer to track use of the informational materials • Website/social media analytics • Counts of informational materials distributed 	<ul style="list-style-type: none"> • Simple dashboard with counts displayed on agency webpage or intranet
Consult	<ul style="list-style-type: none"> • Presentations or exhibitions • Meetings or workshops 	<p>All of the items from Inform, plus:</p> <ul style="list-style-type: none"> • Flip charts/virtual white boards • AI assisted notes from meeting • Participant worksheets • Short meeting polls conducted in real-time 	<ul style="list-style-type: none"> • Summary of key themes • Dashboard of relevant meeting metrics • Dashboard of poll results displayed on agency webpage or intranet
Collaborate	<ul style="list-style-type: none"> • Web-based and asynchronous collaboration platforms • Photo voice 	<p>All items from Inform and Consult, plus:</p> <ul style="list-style-type: none"> • Web analytics • Collaborative document • Pictures/video themes 	<ul style="list-style-type: none"> • Summary of key themes • Journey map/photo montage • Dashboard of relevant meeting metrics
Empower	<ul style="list-style-type: none"> • Community forums and action planning sessions 	<p>All items from previous levels of engagement, plus:</p> <ul style="list-style-type: none"> • Action plan document 	<ul style="list-style-type: none"> • Completed action plan • Journey map/photo montage • Dashboard of relevant meeting metrics



OUTPUTS AND OUTCOMES:

Outputs	Outcomes
<ul style="list-style-type: none">• Clear understanding of how the agency is defining the problem.• Individuals and communities were clear about their role.• Identification of “who” has the final say or deciding authority.• List of individuals who may be affected by the decision.• Identification of the resources needed to conduct public participation.• Clear understanding of how the information will be used.• Identification of the level of participation.• List of relevant groups/individuals who need to be engaged.• List of relevant groups who are already engaged and can be a resource for the agency.• Any barriers to access were addressed by the agency.• Number of individuals receiving the survey.• Percentage of participant response.• Understanding how communities/individuals feel about the federal government.• Understanding the reason behind unfavorable or favorable views.• Understanding if there are differences in perception based on demographics.• Percentage of participants selecting different responses on the survey.	<p>Short-term:</p> <ul style="list-style-type: none">• All relevant groups and communities agree on the problem.• Meetings are accessible to all.• All communication material is accessible to all.• Resources are allocated equitably. <p>Medium and Long-term:</p> <ul style="list-style-type: none">• Buy-in from public and relevant groups.• Agency does not overpromise participants about the influence they have on final decisions.• Agency is better prepared to conduct the participatory process.• Effective public participation process is designed.• Participants are satisfied with the process and outcomes.• The full range of perspectives needed to conduct meaningful public participation is achieved.• Changing perception of federal government.• Participants are fully aware of and understand what is being communicated.• Effective participation by individuals and community members.• Increasing trust in federal institutions.• Barriers to public participation are alleviated.• Participatory process enables people/communities to influence the decisions and actions that affect their lives.

ADDITIONAL RESOURCES:

- [Partnership for Public Service Survey Template](#)
- [Centers for Disease Control and Prevention: Designing Surveys](#)
- [Office of Management and Budget Standards and Guidelines for Statistical Surveys](#)
- [Nutrition and Aging Resource Center: Basic Tips for Creating Surveys](#)