

Member Surveys: Why, When, and How

Affiliated Title Association Officer-Executive Meeting

October 6, 2004
Boston, Massachusetts

Michael Sherman, Ph.D., CAE
Association Research, Inc.
Rockville, Maryland



Two major purposes of information collection by trade associations:

Obtain data that can be used *externally* by members and others interested in the industry.

Internal uses, such as decision-making, planning, evaluation, and marketing.

Types of information for internal use

Membership feedback :

Identify member needs, evaluate programs, measure satisfaction with association offerings (e.g., exit surveys, needs assessments).

Marketing research:

Determine needs of marketplace served by association (e.g., readership).

Government and regulatory affairs:

Data for governmental and regulatory inquiries, identify interests of members and how best to represent them.

The “Backward” Research Process

- Determine key decisions to be made
- Determine what information is needed
- Prepare prototype report
- Determine what questions are needed
- Design sample
- Implement research design
- Analyze data
- Write report
- Implement results
- Evaluate research process

Secondary Research Sources:

Associations—your own/sister assns
Government—census, BLS, agencies
Private Research—libraries, members
Universities—faculty, dissertations

Primary Research

original research conducted for specific reason

Data Collection Methods

Mail/Fax
Telephone
Online (Web-based)
Personal Interviews
Focus Groups

COMPARISON OF RESEARCH TECHNIQUES

Survey Techniques

| | <i>Mail</i> | <i>Online</i> | <i>Telephone</i> | <i>Individual Interviews</i> | <i>Focus Groups</i> |
|-------------------------------------|-------------|---------------|------------------|------------------------------|---------------------|
| Relative Cost | High | Moderate | Moderate | High | High |
| Length of Time | Long | Short | Shortest | Long | Short |
| Response Rate | Low | Varies | High | Moderate | High |
| Respondent Confidentiality | High | High | Low | None | None |
| Complexity of Questions | Moderate | Moderate | Low | High | High |
| Potential for Interview Bias | Low | Low | Moderate | High | Moderate |

Writing Survey Questions

Question Validity—every respondent should interpret each question the same

Type of Questions

Open-Ended

Close-Ended

Yes/No

Multiple Choice

Rating Scales

Ideal Size

4-8 pages hardcopy, 1 ounce, 15 minutes

SAMPLE SURVEY QUESTIONS

Inadequate or Ambiguous Wording

Poor

"Do you attend meetings?" (*Which meeting, when, how often?*)

Good

"Have you attended our annual leadership conference in the past three years?"

Bias

Poor

"Should we raise dues for our suppliers who can afford it more than we can?" (*Not very objective*)

Good

"Do you believe that we should increase the dues paid by supplier members from \$150 to \$200 per year?"

Double-Barreled Questions

Poor

"Do you favor reducing the association deficit by raising dues?" *(There are two issues here—one concerns the existence of a deficit and the other concerns a dues increase)*

Good

"Should the association be allowed to operate with an annual deficit?"

Yes No

"What should be done to eliminate the association deficit?"

- Raise dues
- Reduce staff
- Eliminate programs

SAMPLE RATING SCALE QUESTION

"Please indicate how useful you think the association magazine is:"

| | | | | | |
|------------------------|---------------|----------------|-----------------------|------------------------------|--|
| <i>Very Useful</i> | <i>Useful</i> | <i>Neutral</i> | <i>Not Useful</i> | <i>Not Useful At All</i> | <i>Familiar But Do Not Use</i> |
| 1 | 2 | 3 | 4 | 5 | 6 |

ABC 2004 MEMBER NEEDS ASSESSMENT SURVEY

Association Research, Inc. (ARI), an independent survey research organization, is conducting this confidential survey for ABC. All responses will be kept completely anonymous.

This survey will take approximately 15 minutes to complete.

Please return your questionnaire no later than **MAY 28, 2004**, either online or by fax to (240) 268-1267. If there is a problem, please e-mail Association Research, Inc., at info@associationresearch.com

We encourage you to complete the survey online by going to the following Web site:
www.ari-surveys.com/run/Member

Thank you in advance for your time and commitment to ABC and the industry.

ABOUT YOU

1. What is your primary work location (state)? _____
2. How many years' experience do you have working in the industry? _____ Years
3. What is your gender?
 1. Male
 2. Female
4. When were you born? 19 ____
5. What best describes your current position? (Check only one)
 1. Owner, Proprietor
 2. Chief Executive, President
 3. Senior Executive
 4. Manager
 5. Professional/Technical Staff
 6. Other (Specify) _____
6. What best describes your function? (Check only one)
 1. Professional Personnel
 2. Agent or abstractor
 3. Associate (e.g., attorney, technology vendor, banker, etc.)
 4. Other (Specify) _____

ABOUT YOUR COMPANY

7. Total number of company employees: Full-time _____ Part-time _____
8. How would you describe your company? (Check only one)
 1. Sole Proprietorship
 2. Partnership
 3. Corporation
 4. S-Corporation/LLC (Limited Liability Company)

Survey Sampling

Sampling Methods

Probability Techniques

Random Sample—everyone has equal chance of being selected

Systematic (nth) Sample—strategy e.g., oversample states

Non-Probability Techniques

Convenience—at convention

Quota—first 10 mfrs.

How large a sample?—magic # = 370

SAMPLE SIZES REQUIRED FOR FINITE POPULATIONS

95% Confidence Level
Percent in population assumed to be 50%
Sample Error = $\pm 5\%$

| <i>Size of Population</i> | <i>Number of Respondents Needed</i> | <i>Sample Size for 35% Response Rate</i> |
|---------------------------|-------------------------------------|--|
| 1,000 | 278 | 794 |
| 2,000 | 322 | 920 |
| 3,000 | 341 | 974 |
| 4,000 | 350 | 1000 |
| 5,000 | 357 | 1020 |
| 10,000 | 370 | 1057 |
| 20,000 | 377 | 1077 |
| 50,000 | 381 | 1089 |
| 100,000 | 383 | 1094 |
| >500,000 | 384 | 1097 |

Outside Resources

Research firms

Consultants

Faculty

Request for Proposal

RESEARCH REQUEST FOR PROPOSAL GUIDELINES

Research Objectives

Purpose of Research

(e.g., determine member needs, identify new market, select meeting sites)

Why research is being conducted

(e.g., directed by committee, part of strategic planning, staff directed marketing research)

Services Desired

(e.g., Instrument design, Data collection, Data tabulation
Analysis, Printing/postage/ mailing)

Size of Population to be Surveyed

(e.g., 2,000 regular members and 500 suppliers, 35 board members,
10,000 registered nurses, etc.)

Response Rates from Previous Surveys

Desired Completion Date

Other Important Dates

(e.g., committee meetings for planning, Board/membership meetings for presentations.)

Special Characteristics of Respondents

(e.g., usually out of office for vacations in July, too busy just before tax season, easier to reach by phone, etc.)

Is Experience in Industry or Profession Required or Helpful?

Who Will Make Decision?

(committee, board, department head, etc.)

Basis for Selecting a Vendor

(e.g., cost, experience, references, etc.)

When Will Decision Be Made?

OPTIONAL

Budget Available for Project

(This can really help the vendor understand the level of effort that will be appropriate for the level of funding. This will, on the positive side, eliminate some vendors whose fees are higher than you can afford. However, the budget might become a target level for bidders and you might not get the most competitive bids.)

Online Surveys

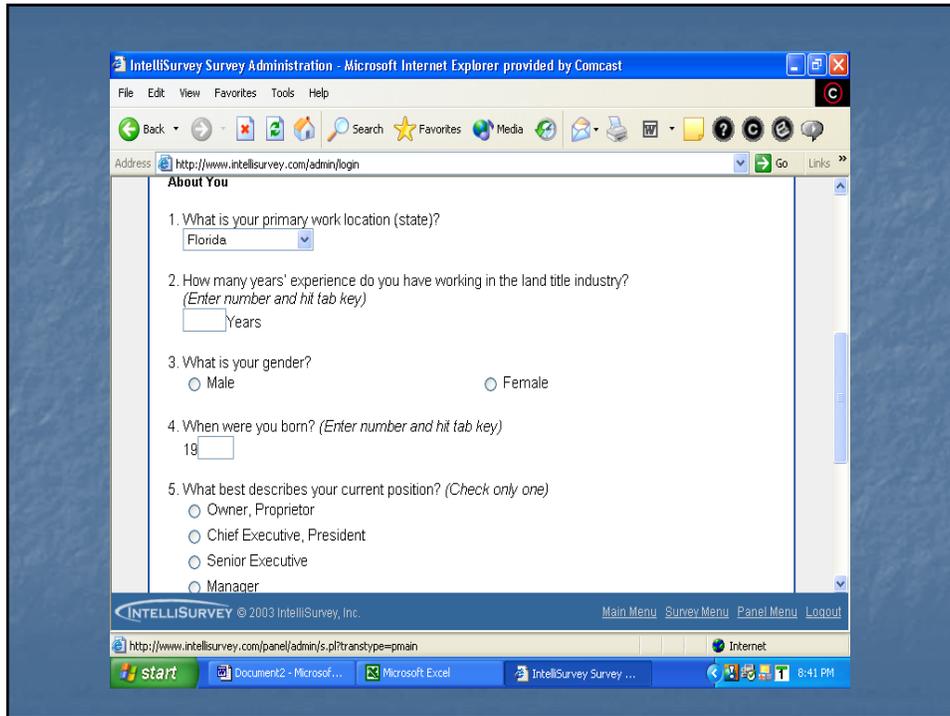
Contract out

- Research firms
- Consultants
- Faculty

Do It Yourself

Online Survey Systems

- Survey Monkey.com
- Zoomerang.com
- InstantSurvey.com
- Inquisite.com



Golden Rules of Surveys

- Don't ask if you don't want to know the answer.
- Don't ask if you are not willing to make changes.
- Don't use a survey to promote products/services.
- Don't survey yourself (i.e., board, leaders, etc.).
- Don't do it if the report is destined for the shelf.
- Don't ask for more than you need.



15200 Shady Grove Road • Suite 306 • Rockville MD 20850 • P 240.268.1262 • F 240.268.1267 • www.associationresearch.com