**4.6 Designing and Implementing Baseline and Post-Activation Surveys Tip Sheet**

**Purpose:** Surveys can help network organizers improve network performance management by identifying successes, gaps, and challenges in performance over time and following specific events.

**Directions:** Survey analysis is most useful when combined with other forms of research (e.g., interviews, focus groups) and informal conversations (e.g., talking with network members and individuals from vulnerable populations on an ongoing basis).

## Overview of the Survey Process

1. Decide what information is being sought.
2. Determine the best way to collect the data.
3. Draft the survey.
4. Test the survey.
5. Distribute the survey.
6. Tabulate and analyze.
7. Present findings.
8. Create accountability.

### A. Decide what information is being sought.

Before drafting a survey, answer the following questions:

* What is the main, underlying question this survey seeks to answer?
* What data needs to be collected to answer the question?
* Who will receive the survey?
* How will the information be used by the network and individual organizations to:
	+ Identify gaps?
	+ Identify successful practices?
	+ Make decisions?

**Hint:** Avoid asking questions because the answers would be “nice to know” rather than “need to know.” Use survey responses to guide decisions and generate action. Focusing the survey on critical data will reduce the costs associated with analyzing and warehousing nonessential data.

### B. Determine the best way to collect the data.

Think beyond collection. Design the survey for ease in tabulating data and analyzing survey results. Consider these questions:

* Do all targeted respondents have access to a computer with an Internet connection so that an Internet survey may work?
* Are there respondents who will be more comfortable with a traditional pen and paper survey? If so, how can that data be compiled for analysis?
* Are there additional language, literacy, and sensory processing needs among potential respondents to be considered in the formatting, distribution, and collection of the survey?

### C. Draft the survey.

The answers to questions below will provide guidance about the specific content and format of survey questions. Consider the following:

* Why is this question being asked?
* What network decisions will be influenced by the answer?
* Will respondents be able to answer the question without needing to stop and find data? Return rates will likely be higher if requested information is at the respondent’s fingertips.

Refine questions:

* Avoid compound or double-barreled questions.
* Use simple, direct language.
* Use neutral language; avoid hot-button or emotion-inducing words.
* Avoid leading questions.
* Keep the overall survey brief.

### D. Test the survey.

Ask someone not involved in developing the survey but familiar with the content to take the draft survey. Afterward, ask:

* How long did it take to complete the survey?
* Were the questions clear?
* Were questions answered without needing additional research?

Make revisions as needed.

### E. Distribute the survey.

Develop a brief cover memo that describes:

* Purpose of the survey
* Length of time to complete
* Closing date for returning surveys
* Plan for analysis
* Plan for reporting

Be sure instructions are clear for returning the survey.

### F. Tabulate and analyze.

* Check all calculations twice.
* Consider the use of visual tools to present information in addition to narrative that will be provided (e.g., graphs or charts).
* Describe how questions were answered and whether responses prompted additional questions.
* Develop an executive summary that succinctly outlines major findings to accompany more detailed descriptions of responses and visual representations.

### G. Present findings.

Well-developed surveys will provide valuable feedback for the network and individual members. Present survey results at a meeting so that network members can discuss what is learned and how to use the findings.

### H. Create accountability.

Assign either an agency or individual to take charge of re-administering the baseline survey on an agreed upon interval. Link the post-activation survey to the After Action Report (AAR) function of the network to maximize the extraction of lessons learned from an event or exercise.

## Baseline Surveys

Baseline surveys collect basic information about the characteristics and potential capabilities of a network. Categories of information collected over time will make it possible to analyze growth in capacity and capability to reach vulnerable populations in an emergency. Be sure to repeat this type of survey on a regular basis (e.g., annually) and compare from year to year how the information changes.

### Information to be collected

Include the following categories of information in the survey; adapt as needed.

* Agency information
	+ Contact information: name, address, phone and fax, e-mail, web address
	+ Organizational information: executive director, mission
* Specific contact information for the *primary* and *alternate* individuals who will act as points of contact (POCs). Be sure to get both business contact information as well as after-hours contact information if the POC has agreed to be available evenings, weekends, and holidays. Include a question about how to notify the network when the primary contact is on vacation or unavailable.
	+ Name
	+ Phone (landline and mobile)
	+ E-mail
	+ Texting capability/preferences
	+ Use of or participation in social media
	+ Availability of smartphone
* Technology use and preferences for *receiving* and *sending* for agency and individual POCs. Include questions about social media, reverse notifications systems, and any other specialized technology.
	+ Routine communication
	+ Emergency situations
	+ Loss of power/electricity
	+ Any other special considerations
* Populations the POC can reach:
	+ Catchment or jurisdictional area
	+ Number of people in the target population(s) served
	+ Number of people that agency can reach with a message
	+ Routine communication with electricity
	+ Emergency communication
	+ With electricity
	+ Without electricity
* Other conduits of information that create redundancy:
	+ For the agency/POC
		- Other sources of emergency information
		- Other sources of information about the target population (this includes other agencies or organizations)
	+ For target populations
		- Other sources of information that are considered reliable within the community

## Post-Activation Surveys

A post-activation survey provides an opportunity to assess how well the network actually functioned during an event or an exercise. It can provide a snapshot of the network in action that supplements an AAR process.

### Information to be collected

Two broad questions to be answered:

* How did the network work?
* What needs improvement?

More specifically, consider the following categories of information to be explored:

* How accurate was contact information? Bounced e-mails are one indication of inaccurate contact information.
* How well did the preferred technologies work?
	+ Receiving?
	+ Sending?
* Were there any circumstances that triggered the use of back-up:
	+ Contact information?
	+ Power sources?
	+ Technologies?
* What, if any, delays occurred in transmission of information?
	+ From network to POC?
	+ From POC to target populations?
* Is there any information or data about:
	+ How many of the intended vulnerable populations actually received information?
	+ Whether intended vulnerable populations took action as requested?
	+ Complaints or kudos about the information/message?
	+ Readability and understandability of content?
* Value of content
* Timeliness