PATRON INSIGHT

A Buyer's Guide to Research From Patron Insight, Inc.

Why conduct research?

It's a familiar, but accurate statement: Perception is reality.

Market research offers an organization insight into the perceptions of key audiences on ideas it is considering, such as potential ballot issues, services or quality-control issues such as an organization's performance.

By understanding how ideas are perceived, organization's can make more informed decisions, and can use the information gained through the research to plan and execute a more effective communications strategy that either affirms accurate perceptions, or seeks to adjust those that are incorrect.

Doing it yourself versus hiring a research partner

Once you've decided your organization would benefit from research, you'll need to evaluate the merits of doing it yourself versus hiring an outside research partner to assist.

Generally speaking, an organization is in an ideal position to conduct its own research when the need is routine (rather than "mission-critical"). Examples would include public forums to take patron temperatures on a topic, online surveys of patrons on a specific issue affecting the organization or regular meetings with advisory committees.

These research endeavors offer public relations benefits, but do not provide meaningful, reliable data that can be used to confidently inform decision-making on critical issues.

When critical issues arise that would benefit from statistically reliable research data, an outside partner can provide the objectivity an organization needs at this key moment, the skill to ask the hard questions the right way to get at true perceptions, and the ability for the organization to tell key audiences that "we turned to outside help, to make certain we had a comprehensive analysis of key opinions."

When you decide to engage outside assistance, here are some steps to help make that engagement productive and successful:

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Step one: Identify your information needs

Research planning should always begin with a simple question, "When we're done, what do we need to know to help us make decisions?"

It's important to think in terms of information needs first, rather than launching immediately into writing questions, creating a moderator's guide for a focus group, or crafting an online survey. In doing so, you'll narrow your focus to the specific information you need to know, while also helping to guide you to the right approach to collecting the data.

For example, your list might include topics such as:

- How patrons rate the organization's performance
- What patrons like and dislike about a potential ballot proposal
- What patrons would be willing to pay for a proposal they like
- Whether or not patrons have absorbed the information you've been providing about budgets, policy changes, or any of a number of other topics
- Where patrons get their news about the organization

In doing so, be as precise – and as disciplined – as possible. While you should take advantage of the opportunity to ask about any topic that is of value, you should limit the desire to use this process to collect data on mere curiosities. In other words, if you are "just curious," but don't know how you will use the data, don't include it on your list.

Step two: Select your method of data collection, based on how you plan to use the information

Once you know what you want to find out, you need to ask whether you want quantitative, statistically reliable data or qualitative insight.

<u>Quantitative data</u> is essential if you want to use research to reliably predict (within a few percentage points) what an entire audience will do. By gathering the opinions of just a few hundred (400, in most cases) geographically scattered representatives of a target audience, you can accurately estimate the behavior of the entire group.

For example, if you are trying to decide whether or not patrons would support a bond issue, quantitative data will tell you what they think of your proposal, its components, and the cost. From there, you can put the pieces together to create a proposal that has a better than average chance of success (because you will know what patrons think about each aspect), or you can decide that now is not the time to be proposing anything.

The most common – and most effective – format for quantitative data is the traditional telephone survey. Used with confidence by political pollsters to this day (even with the growth in cell-phone-only households), telephone surveys provide the most reliable data, because they allow you to pinpoint where calls are placed. This makes certain your data is collected equitably across your district, based on population patterns.

Qualitative data, on the other hand, is most helpful when you need to "hear the voice of the patron (staff member or any other audience)," and when you don't intend to assume that a small subset of your target audience speaks for everyone in the group.

Qualitative processes – such as focus groups – are a form of organized eavesdropping (with an agenda, of course), giving you the chance to hear how people talk about your organization, or any aspect of it. They are ideal for preliminary testing of new ideas, for checking plans to see if there are any holes, and for seeing the differences of opinion between various key groups (parents and teachers, community leaders and administration, etc.)

Falling somewhere in between those methods is Quasitative™ research. Such research bears a resemblance to quantitative, because it collects numerical data, but it does not have the statistical reliability of such processes.

Quasitative data can be collected through online and mail surveys, or any other research approach in which you have no control over who chooses to participate – and who does not.

In other words, you may send a link to an online survey to all your patrons, but you will not have any control over whether those who respond are representative of a specific group. For example, if you are a school district you may have overwhelming participation from parents of one elementary school and almost none from another – even though their populations are similar.

Such processes, however, are ideal in combination with quantitative data collection, because they provide school districts the reliability of the quantitative process to help make decisions, with the public relations benefit of making a feedback opportunity available to all.

Step three: Set your budget and timetable

Before you seek out a research partner to assist you, it's important to identify your budget parameters and your timetable expectations.

Budgets for research vary widely, but here are some general guidelines:

Telephone surveys: These are typically budgeted based on the cost per completed survey call. That means you contract for a certain number of completed surveys, and it is up to your research partner to continue calling in the targeted areas until the quota has been reached.

The costs can range anywhere from $17 per completed call (for 400) up to $35, depending on the length of the survey and the complexity of the quota. Open-ended questions ("Why did you say that?") require more time on the phone and, therefore, add to the cost, so use them judiciously. Also, complicated quotas (such as "We want 400 patrons who have a child in elementary school only, but who have never had a child in any other school in the district") make it more difficult, and costly, as well.

Generally speaking, respondents should be a head of household (male or female), a registered voter, and aware that they live within your target area. Other than that, calls should be divided to match the general population patterns, and that's it. Unless you are looking for a very specific audience, this is a good standard set of requirements.

Focus groups: Group rates typically run from $1,000 - $2,000 per group, plus any costs for recruiting (from $500 to $1,000 per group), for an honorarium for group members (starts at $50 per person), and for food and beverages. And, it's never a good idea to do only one group (three is fairly typical), so plan accordingly.

While you can limit your expenses by doing your own recruiting, it's important to make certain you don't recruit only people you know, because you already know what they will say. Your research partner can help with this.

In terms of recording the sessions, audiotaping allows the leader to concentrate on the group, rather than on taking notes. But, doing so with internal groups is not a good idea, because of their uneasiness about potentially being connected to their comments later on. And, finally, for most audiences, there is little value to videotaping groups, and members often find it off-putting.

Online research: This methodology requires the same discipline as a telephone survey, but lacks the hard costs. Yet, you should still expect to pay a minimum of $4,000 for a quality online survey (development, analysis and reporting).

Mail research: This approach has more hidden costs than you might imagine, making it difficult to estimate the budget.

The obvious costs are for design and analysis of the survey. But, there is also printing, postage (outbound and return), and the labor involved in entering each survey into a database. You may be able to save some budget by offering to perform the data entry services yourself, but don't minimize the time it will take to do that. Even the most skilled person takes at least a minute to enter a survey into a database – even more time if there are open-ended questions. If you have several thousand responses, that can be a significant amount of time.

In terms of timing, you should count on the following as a good range for each process, from the planning meeting until the final report is delivered:

- Telephone surveys – six to eight weeks
- Focus groups – if you do three groups, assume three to four weeks
- Online surveys – three to five weeks
- Mail research – six to eight weeks, depending on the volume of responses

Step four: Solicit potential research partners

The final step is to solicit proposals from potential research partners, via an RFP.

It's not necessary to make this RFP particularly complicated. Simply explain the following:

- Your research needs
- Your timing expectations
- Your thinking on methodology (but be open to other suggestions)
- Your expectations for experience (educational experience is helpful)
- Your deadline for submission

In reviewing the proposals, be certain to look for the following:

- Do they understand your needs?
- Do they have suitable experience, and do they provide references?
- How do they collect data? (In-house staff, partner organization, etc.) Will they be credible representatives of your organization? (Remember, a mispronounced word or an unprofessional approach by a college-age telephone researcher will reflect on your school district.)
- Do they fully explain the budget they are proposing?

It's always a good idea to narrow the field and invite the finalists in for an interview. You want to be certain they not only have the technical skills, but that there is also good chemistry between the research team and the organization.

Step five: Make a selection and promote your research plans

It helps to promote the fact that you will be conducting research, and to announce the protocol to those you will be seeking to reach. It demonstrates transparency, and also stimulates greater levels of participation.

Step six: Stand by

The period when data is being collected is sometimes referred to as "radio silence," because there's little information available on an interim basis – and such data would be of little to no value anyway, because it could change by the time the process is all over. In other words, once the research is "in the field," give your research partner a chance to do their work and produce a quality report.

For more information about how to select a research partner, please contact Patron Insight at 913-814-7626, or info@patroninsight.com