Procedure

STRATHCONA COUNTY

Surveys

Purpose

The purpose of this procedure is to ensure that all Strathcona County employees and consultants working on behalf the County understand the requirements and the approved corporate process for surveying on behalf of the County for both internal (staff) and external (public and stakeholder) audiences. This will ensure consistent quality in surveys in terms of how the questions are organized and asked. This in turn will provide better quality data to be used in County decision making.

Procedures

1. Survey Development

A written survey is one tool used in public engagement. Prior to starting the survey development process, staff should consider contacting the Public Engagement branch of the Communications department to determine whether a survey is the best option to generate the type of information needed. Survey fatigue is a significant problem that reduces the response rate for all internal and external surveys. This fatigue is compounded with each additional survey launched and means that surveys are a tool that should be considered carefully before use.

Prior to starting the survey planning process, staff should also review the information provided on the Insider for public engagement, including:
- Public Engagement Policy and Framework
- Public Engagement Handbook
- Survey Development Guide.

Going through the survey development process is a **requirement** whenever County staff members and/or consultants acting on behalf of County staff members are asking questions of employees, the general public, or stakeholder groups, and regardless of whether it is a large and complex survey, or very simple survey with only a few questions.

The process can help ensure that the survey is the most suitable tool, and that it is written appropriately to avoid negative impacts and subsequent poor data results. Moreover, the review process ensures that the questions asked in the survey are in plain language, with the meaning and intent of the questions clearly understood by the target audience.

This process applies to both new surveys as well as previously developed/implemented surveys. Any survey developed prior to September 2018 that is to be re-administered will need to be reviewed before it goes live on either platform.

If a staff person is writing an XRFP for public engagement services and expects that a survey might be something the proponents would include in the proposal, the Public

Engagement Branch has specific wording that must be included in the XRFP, so the County's standards are met.

2. Approved Survey Tools

Employees and consultants must only use County-approved online platforms for surveys via the County's account (Survey Gizmo and SCOOP). Using online platforms for surveys controlled by consultants is not permitted as this opens the County up to risk and liability because the data is not secure and is not owned by the County (even if it is on the same platform). Furthermore, consultants working on behalf of Strathcona County fall under the same FOIP responsibilities and duties as Strathcona County. This makes it easier to ensure FOIP compliance.

3. Survey Requests

All survey requests (internal and external) will be funneled through the online Survey Central system, not email. This reduces the chance of surveys being missed, because several staff have access to the system. Additionally, it may speed up the survey process and allows for better tracking of resources and documentation.

Survey Central will submit surveys directly to the FOIP group once the final version is completed. The FOIP group will not accept emails from staff.

Staff access to the Survey Central request system is arranged via Communications. Training and other technical assistance is also available through the Survey Central team in Communications by request.

4. Survey Timelines

Timelines have been developed to indicate to staff and consultants how long it may take to complete the survey process. Being aware of this up front is helpful to both the survey requesters and Survey Central staff so they can manage resources and provide the best possible survey to meet the outcomes set out by the survey requester. Staff are encouraged to plan accordingly to ensure their survey can complete the review process by the date expected.

A minimum of 2 weeks is required to complete the survey review process. This minimum is for a short, simple survey which has very few questions and does not include complex skip logic. Longer, more complex surveys may take up to 6 weeks to complete the process.

5. Survey Scheduling

Staff are strongly encouraged to avoid administering surveys in July, August, and December unless the survey topic relates to season-specific activities such as spray parks during the summer, or a holiday event in December.

All staff scheduling surveys are strongly encouraged to use the internal Trumba calendar that was set up for public engagement and survey scheduling to ensure we are not overloading particular stakeholder groups at any given time. This system allows staff to also enter in their own surveys or events as soon as the timing becomes known to help other departments plan around them.

6. Survey Incentives

It can be challenging to encourage participation in County surveys. Random draws can be used to incentivise participation in longer surveys or for surveys on topics that may not garner much interest in the public. Prizes may include gift cards, weekend trips, or event tickets and should be accessible and relevant to all potential participants. Every prize draw must follow the County's contest rules, as well as FOIP regulations when gathering participant contact information. Participants may only enter the draw once per person to ensure data integrity and quality of responses.

Providing incentives for individual survey completion is not permitted. Academic research indicates that individual payment may interfere with data integrity as participants may complete repeat surveys for multiple payment opportunities or provide inaccurate responses in order to receive the payment repeatedly. Strathcona County prioritizes the importance of quality data over quantity of responses.

Providing an incentive for County staff to encourage survey participation is permissible but the prize may be considered a taxable benefit. Contact the Payroll Coordinator in Human Resources for more information.

Using incentives for surveys may fall under contests, which requires additional consideration and consultation with the FOIP team. Not all contests or giveaways are alike, so please review the 'Contest and Give-aways Guide' on The Insider. This will provide template forms and all of the requirements you need to follow when doing any kind of draw for either staff or public survey incentives.

7. Reporting Requirements

Timely reporting in a transparent manner is a requirement within the County's Public Engagement Policy. Failure to do so damages the relationship between the County and survey participants, increases levels of distrust and perceptions of inaction on the County's part, and subsequently decreases the likelihood that the public will continue to engage with the County in the future. This is counterproductive to the County's Corporate Business Plan Goal #7 - Provide opportunities for public engagement and communication.

Survey Central can provide departments with detailed analytics for survey results if coordinated in advance. This is quite time-consuming work. Typically, a report would be made available to the department within 2 weeks of the survey close date.

General survey results (separate from an overall project Final Report) will be reported back to participants and/or the general public in a transparent manner ideally **within 90 days of survey completion**. This can be done in several ways, but as a minimum, by:
- posting on the "Completed Consultations" section of the public-facing website for external surveys,
- posting results on the Insider for large internal (employee) surveys
- Distributing the results to the employees who participated in the survey for smaller internal surveys

In addition, survey reporting can take place via:
- Direct email to specific stakeholder groups
- E-newsletters
- SCOOP internal emails to panel members
- Open houses/information sessions
- Project-specific pages on our external website

If a survey does not include qualitative (open ended) questions, or there are large sections that do not relate to the open—ended responses, this feedback should be made available to the public almost immediately, as the basic question types do not require detailed analysis. **There is no need to wait until a final report has gone for Council approval (if required)**. Each survey should be reported individually as soon as possible after they have taken place, as opposed to an aggregate report of several surveys without the individual survey results).

Timely reporting is the responsibility of the department that sponsored the survey. Reports for surveys (and all other engagement) will include (at a minimum):
- Survey title and date
- How the survey opportunity was communicated (newspaper, direct email, social media)
- A high-level summary of the survey purpose
- The number of responses received
- A summary of what was said
- Next steps in the process

Communications has provided several branded reporting templates for departments to use, with options to modify the reports to the type of survey as needed.

Survey data will be made available on an ongoing basis to other County staff to allow for cross-department learning. Regular updates will be sent out via Communications to share new internal and public survey results with staff, and to inform them of who to contact for additional survey data. When writing the survey report, do not mislead the reader by making claims that cannot be supported from the survey results.

Failure to follow through on survey reporting requirements will be followed up on by Survey Central staff first to the survey requestor, with additional follow up via the survey requestor's direct supervisor, if required.

Any survey data should be sent to the Open Data team to allow for future ease of access by both the public, and other staff members. If the data is for the public, then output should be made available publicly via the Open Data portal. However, the information shared with the public must be first reviewed to ensure that no personal or private data is being exposed. If the data is internal (and considered private) then it will not be shared on the Open Data portal, but instead on the Insider.

8. Use of Consistent Questions

A multidisciplinary staff team spent many hours developing standardized demographic questions for SCOOP. Survey Gizmo surveys must use the same questions to ensure consistency so that data from both platforms can be merged for reporting purposes. This also needs to be in place for all the other questions in surveys that are put on both the SCOOP and Survey Gizmo platforms. It also allows for easier trend analysis for surveys over time on similar topics.

A survey question bank also exists to allow departments to pull from a set of pre-reviewed, approved questions. These questions can be appropriate for a wide variety of needs.

The survey bank is available in the Insider at any time, or staff can contact the Communications Public Engagement Branch for help.

9. Length of Surveys

Short surveys avoid survey fatigue, high incomplete rates and loss of interest from our participants completing our future surveys. In most instances, no County survey should take longer than 10 minutes to complete.

Ideally, SCOOP surveys should take a maximum of 3 – 5 minutes to complete as panelists are more likely to complete them on their phones or tablets. Longer surveys should be split into multiple shorter surveys, though this depends on the topic area. Shorter surveys on the same topic can be useful to the survey requester because the data from the first survey could provide information for the follow up surveys, allowing for a deeper understanding of the issues at hand.

10. Data Security and Information Management

When data is being collected via approved platforms, staff can be assured that it is being stored appropriately, and there is a maximum of three Strathcona County employees who can access the raw data as well as Insightrix, the company supplies the platform. All efforts are made to ensure the security of the data. Raw data collected is secured on approved platforms and limited access to approved personnel. Output of the data is managed according to its sensitivity, following standard data security procedures.

Once information is collected it is retained and disposed of in compliance with the County's corporate records management policies.

A relatively new practice related to data management is also the requirement to use the County's centralized e-newsletter to contact stakeholder groups, or only publicly available email contacts. It is no longer permitted to use stakeholder contact information that has been collected for purposes other than the project the data was collected for. In the past, individual departments maintained lists of their own contacts, which were sometimes shared across departments and branches. This practice is no longer permitted under FOIP and Canadian Anti-Spam Legislation.

For more information on these new requirements, visit the 'Stakeholder Contact Guidelines' page on The Insider. You can also contact the FOIP team or the Public Engagement branch.

Procedure Record

Next Review Date: October 21, 2022   **Policy No:** GOV-002-038

Last Review Date: October 21, 2019

Administrative Review: Communications

Approved by:

                                                            Signed – Kevin Glebe
                                                            Kevin Glebe
                                                            Interim Chief Commissioner

                                                            October 21, 2019
                                                            Date