Step by step Guidelines

to build a PARTNER SURVEY using FBC's survey builder

Draft 01 – 13 March 2017

This guide will help authorized staff members from the 8 participating CARE programs to build and send out a survey to staff of their implementing partners.

It is a simple 9-step process from start to send. But like anything new, the first time you do it you may feel unsure and have questions. We will try and address these questions here. But please don't hesitate to call or email if you have any more.

These guidelines will help you with each step of building and sending out your partner survey. The pictures show the actual web page for each step.

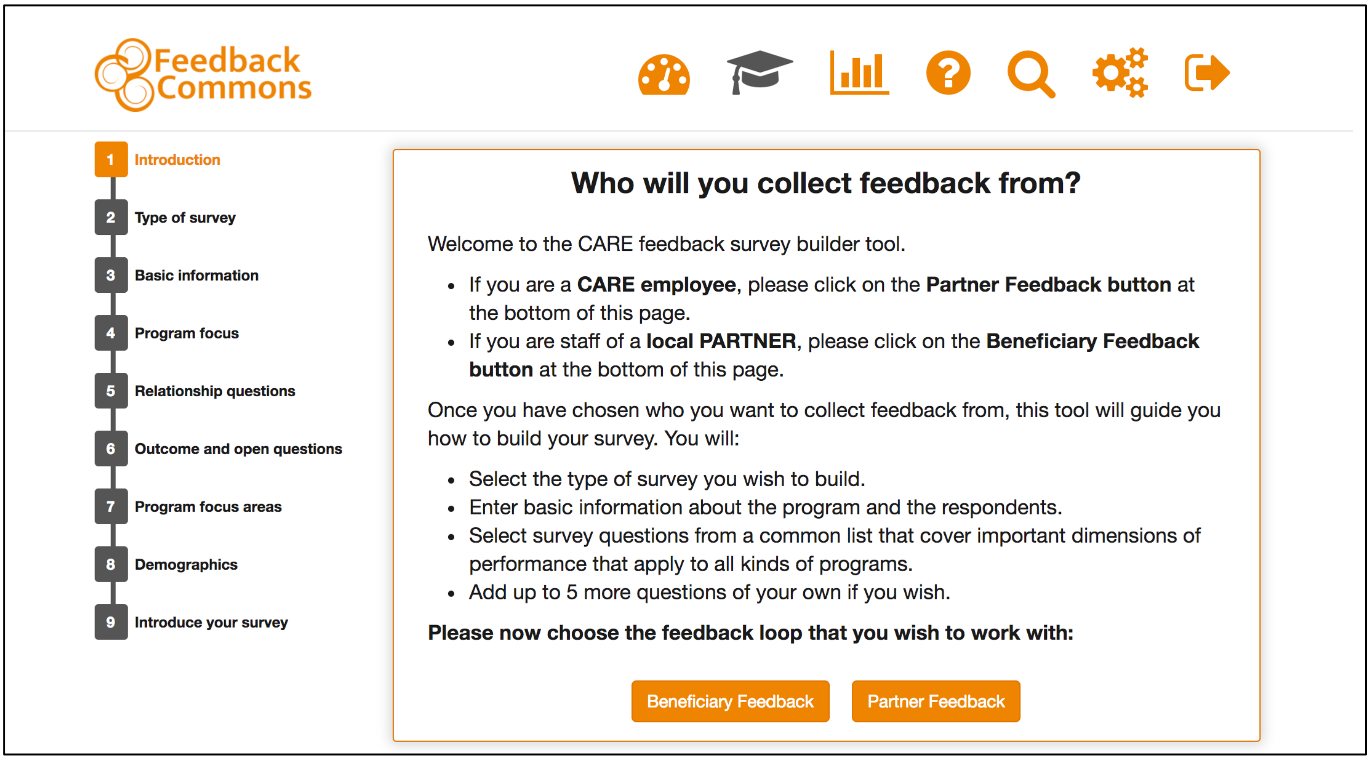
How to access the site

Each person that has been authorized to build surveys has been sent an individual email that contains a link to the Survey Builder in the CARE neighborhood of the Feedback Commons.

This link is your unique gateway to enter the Survey Builder.

- You should save the link in a secure place on your computer so that you can easily find it when you want to build a survey. Or, you can make a bookmark in your browser to the landing page.
- Please do not share it with anyone else. Any survey that you build using this link will be linked to your name. You will be the registered owner of that survey.

Step 1. Who do you want to collect feedback from?



To start with, this pilot will focus on collecting and using feedback in two main feedback loops:

- **Programs** will collect feedback on their performance from their in-country implementing **partners**.
- **Partners** (with support from program staff) will collect feedback on their performance from the **direct beneficiaries** of their support or services. Direct beneficiaries are also referred to as **target groups*** - the people that partners work with *directly* in the communities that the program serves.

You need to select whether you are building a PARTNER survey or a BENEFICIARY survey.

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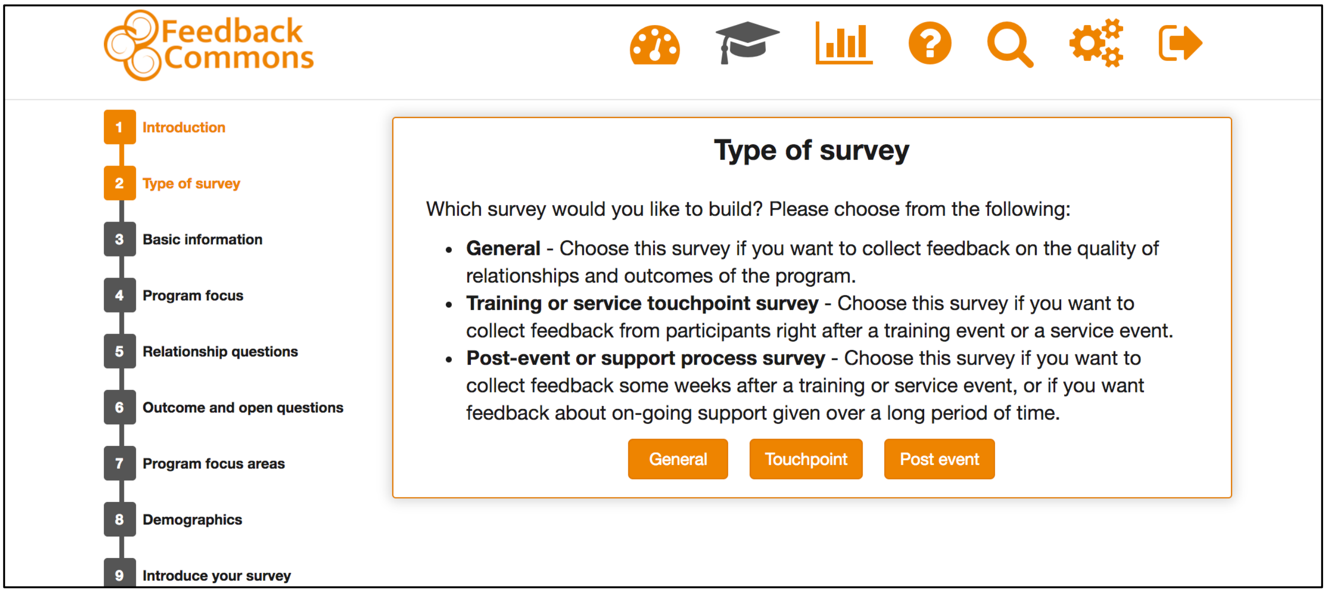
target groups vs. direct beneficiaries** – CARE's programs are, in most cases, designed to support poor and marginalized communities to actively participate in their own development. They do this by identifying and ***directly supporting specific groups and structures of people – mostly from within the impact community. CARE seems to use both terms – but it would be better to settle on one. For now we use the term beneficiary feedback.

Step 2. What type of survey do you want to build now?



In our first round of country visits, all programs indicated that it would be useful to collect feedback from partner management and field staff about:

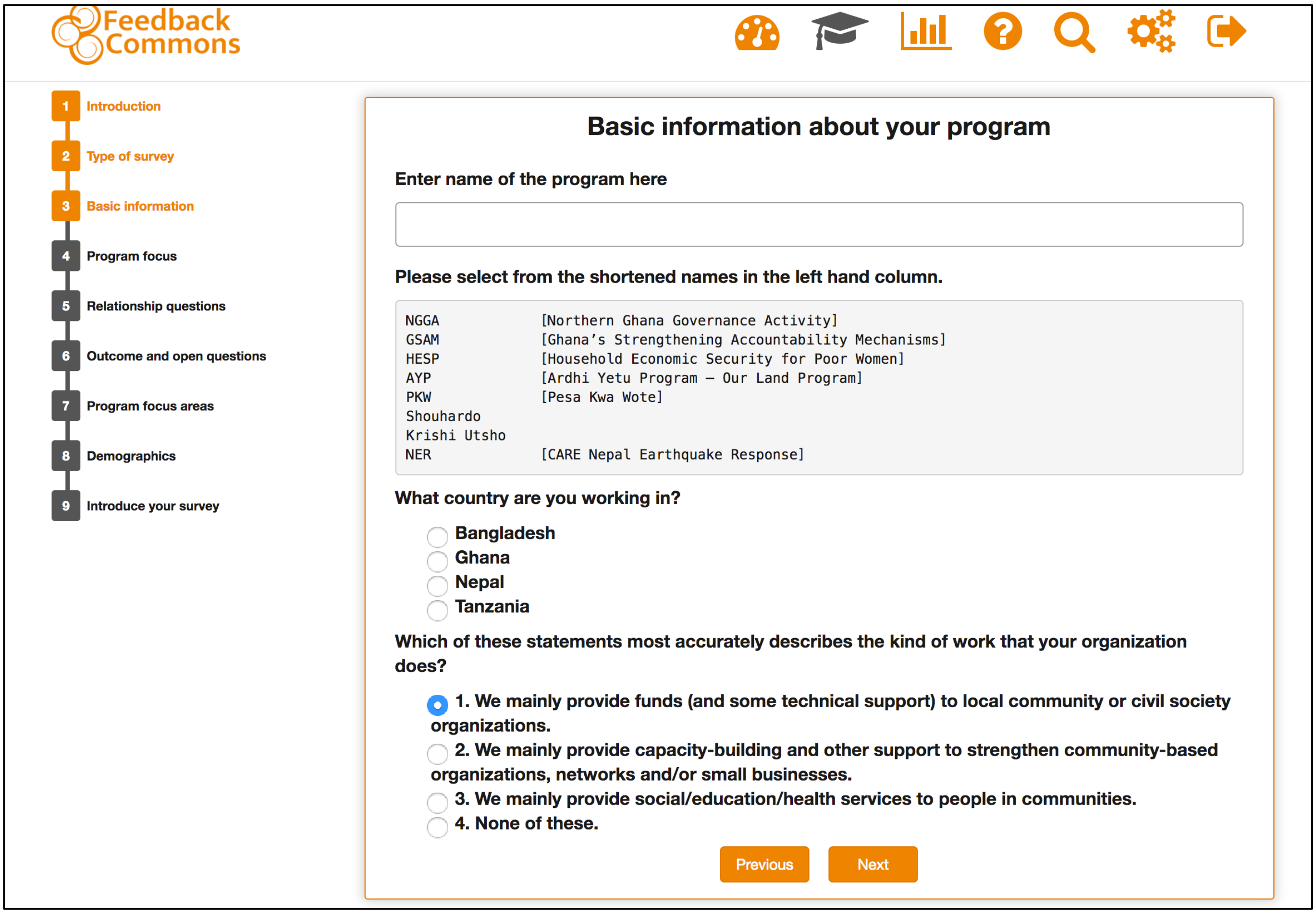
- The quality of their **relationship** with program staff.
- The quality of specific **services** received from program staff.
- The results or **outcomes** of program activities (planned and unplanned) as these emerge during the life of the program.

We have designed three different survey tools that can be used through the life of the program to collect a continuous stream of feedback data (or perceptual evidence) on the quality and relevance of services, the quality of relationships and the results/outcomes of program activities.

Feedback can be collected from different groups of respondents at any time that is easy and convenient. Each program must decide how many questions they can ask at one time, and how frequently they can collect feedback from partner staff.

Feedback about...	Survey tool	Time and Frequency	Other
Quality of a specific **service** (such as a training session, health visit etc.)	**Touchpoint survey**	Conducted at, or soon after, any specific service or training (as many as possible)	Collected for specific training or service events – but in the analysis, you can combine responses for specific events to give a general picture of the effectiveness of different types of service or training.
How effective a specific **training** or ongoing **support process** has been (how capable they feel to apply what they have learned)	**Post-event or process survey**	Conducted approx. 4-6 weeks)after a specific training program OR after a period of mentoring and support (approx 3-6 months	
The quality of relationships and emerging outcomes Ideally from ALL partner managers and staff.	**General survey**	Conducted periodically (e.g. every 3-6 months) or when there is a need or opportunity (e.g. when respondents are together at a meeting)	Covers things like confidence, trust, integrity, responsiveness, agency etc. Can be used to collect perceived progress against intended outcomes, or to report unintended results. NOTE: Each survey should not include more than 4-6 questions. But you can ask other questions in later surveys.

Step 3. Basic information about your program



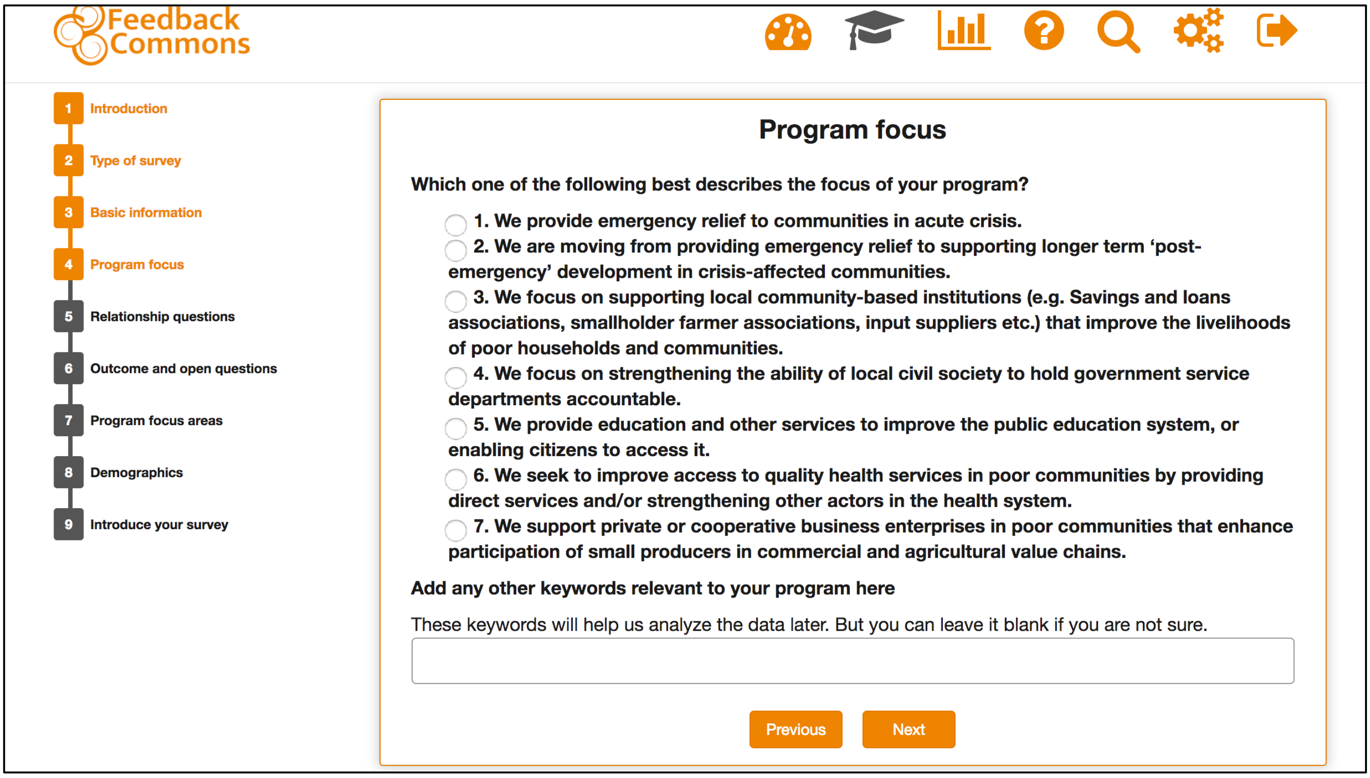
In this step, you enter the program name (please use the shortened name from the list), the country you work in and what kind of organization you are.

By selecting 1 or 2 or 3 you are essentially stating whether you are a (1) funder, (2) an implementer of programs that involves supporting locally based CSOs and CBOs, or (3) a direct provider of health or education services.

This information must be collected in a standardized way so that you will always be able to retrieve all your feedback data.

It will also enable you to compare your data with that of other CARE programs like yours or in the same country.

Step 4. What is the focus area of your program?



Focus categories

In this step, please select the statement that best describes the focus of your work. You can only choose ONE category. We know that no single sentence will perfectly describe what you do, but please choose the statement that you think is most applicable.

We need to collect this information in a standardized way to make sure – especially if CARE adopts the system more widely – that programs will be able to benchmark their performance against other programs that have a similar focus.

Please let us know if these focus categories can be improved.

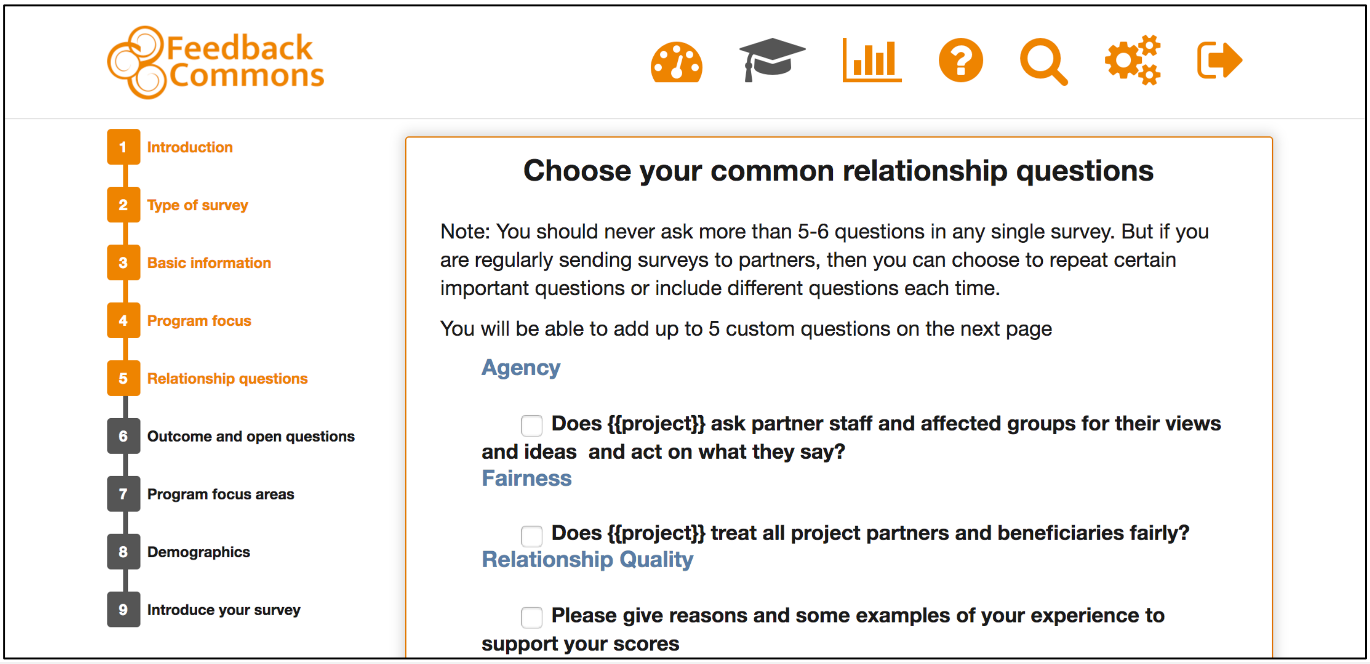
Keywords

Another way of identifying similar programs is for each program to enter a few keywords that give us an idea of their focus.

For example: A program working on supporting good governance could enter words like: *local government, accountability, citizen engagement, public sector accountability* etc.

Over time we will be able to see which keywords are most useful. But for now, we will rely on the focus categories.

Step 5. Choosing questions from the common question lists



The **General Survey builder** has two pages of common questions. One set covers questions about ***relationship quality*** (illustrated above) and a second set (illustrated on the next page) covers questions about ***results or outcomes*** of program activities.
The **Touchpoint** and **Post-training** surveys have a much shorter set of common questions.

Why common questions?

Some of the questions that you include in your survey must be asked in exactly the same way in all CARE program surveys. We call these the *common questions*. We do this because programs can only compare their feedback with others if they have asked the same questions.

In our first round of country visits we created a list of 8 **relationship questions** and 3 **outcome questions** that all participating programs thought were important. These can still be revised and new ones added.

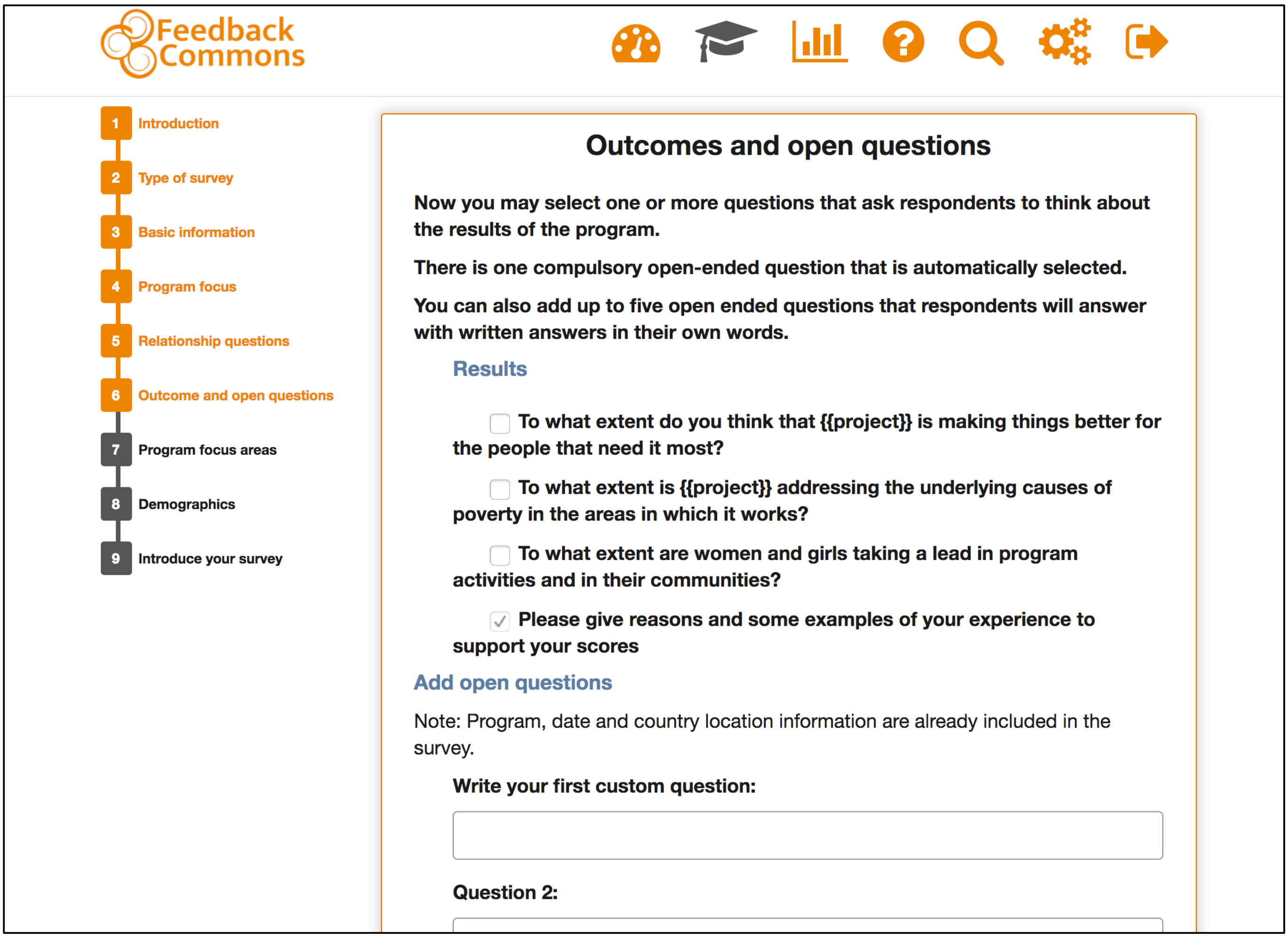
When you build your survey, you can choose to include questions from these two lists. You may select all eleven questions in the same survey. But Keystone has found that it is often better to choose fewer questions (5-6 at most) each time you send out a survey. This means that the survey can be answered more quickly – and you are more likely to get thoughtful responses and response rates tend to be higher. It is also easier to discuss feedback thoroughly with respondent groups if there are fewer questions each time.

However, because you can send out more than one survey in a year, it is possible to get feedback on most or even all the questions over time. The responses are added to the database and can be analyzed whenever you want to.

You select questions by clicking on the box next to the question that you wish to include.[1]

[1] Possible additional question: In your view, are the people working in this program working together and collaborating as well as they could be?

Step 6. Choosing from the common *outcomes* question list – and adding your own open questions



On this page, you can people to what extent they feel that the program activities are contributing to intended program outcomes. add one or more questions about program outcomes.

In the list, we only include cross-cutting outcomes that apply to all CARE programs. But you can ask questions related to your own program outcomes in the custom questions that you create yourselves.

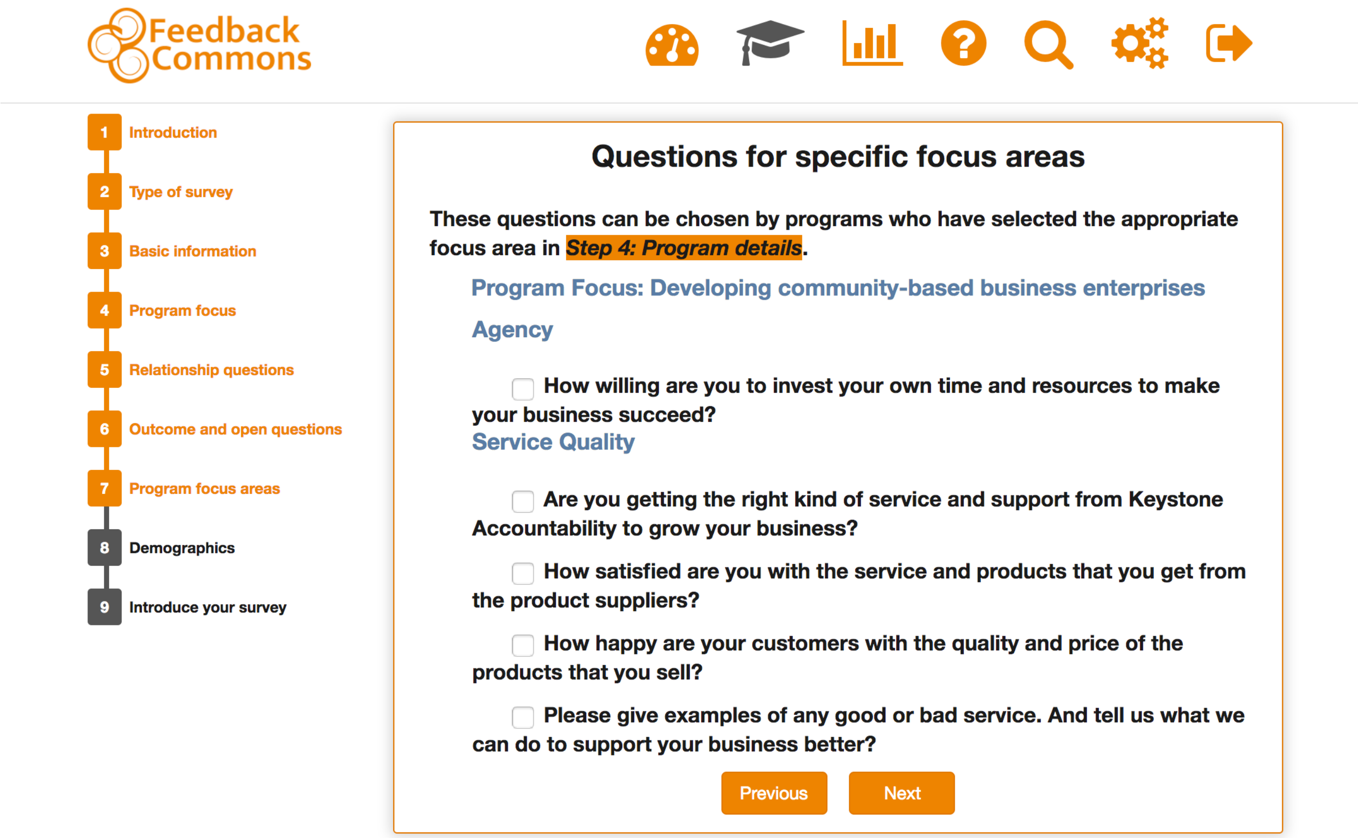
At this time, you can only create your own open questions – that people answer in their own words rather than by selecting a number on a scale. But we hope soon to make available text analysis software that will help quantify responses to reveal patterns in the open feedback.

Remember that the questions that you select on this page will be added to the questions that you selected on the previous page! If you find that you have selected too many questions, you can go back and change your selections by clicking on the relevant orange button to the left of the screen.

You can include questions about whether people see progress in the three pillars of the CARE approach:

- **Strengthening gender equality and women's voice.**
- **Promoting inclusive governance.**
- **Increasing resilience.**

Step 7. Specific program focus questions



Some programs have a specific focus that requires a few questions that do not apply to other programs.

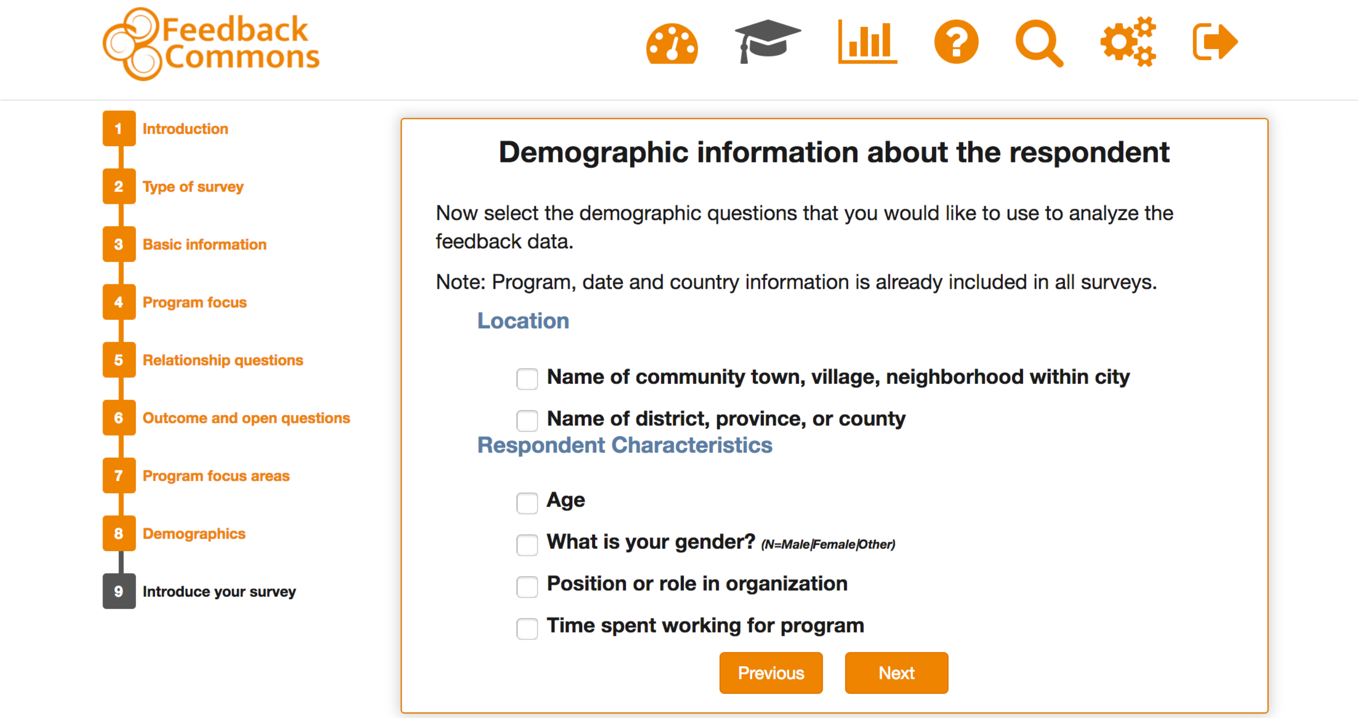
For example, in this pilot, Krishi Utsho supports private businesses in poor farming communities to supply quality, reasonably-priced agricultural inputs to small farmers who would otherwise depend on unreliable and expensive commercial suppliers. Krishi Utsho sees its shopkeepers as its local partners and their customers as the target group.

We have therefore created this extra list of questions for programs like Krishi Utsho that support community-based business enterprises.

These questions are unlikely to interest other programs.

However, if other programs feel that they would also benefit from a unique set of questions that apply only to their focus area, we could consider building that into the Survey Builder too. We will follow this up with you in our second cycle.

Step 8 Demographic information



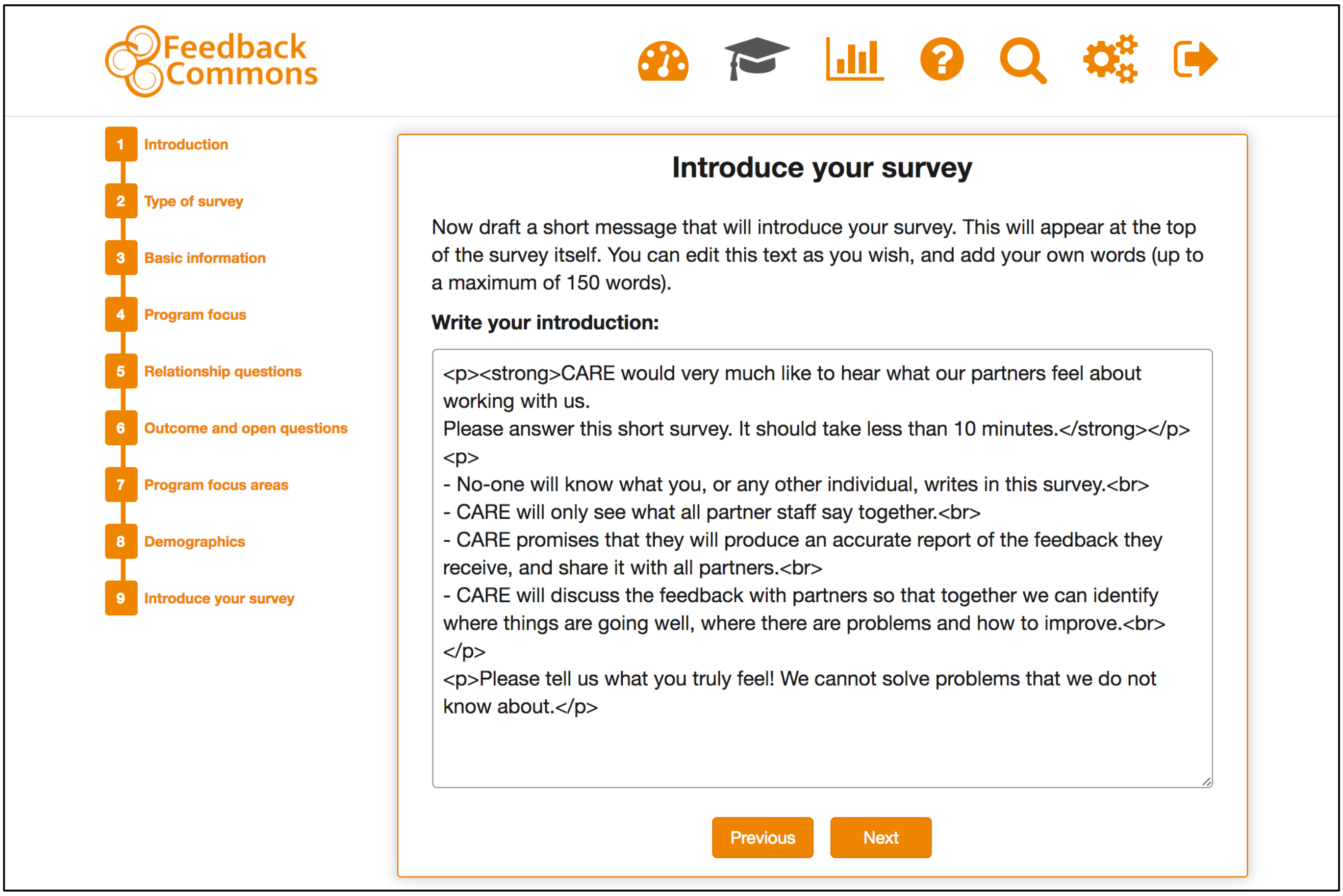
Comparing feedback from different groups of partner staff

When we come to analyze our feedback results, we can learn a lot by comparing what different groups of respondents say.
But to do this, we must ask them to tell us a little about themselves in the survey. On this page you can select what information you want partners to tell you about themselves.

Remember: If there are only a few respondents, some people might not want to answer a demographic question because it will enable you to identify who they are. Avoid asking such questions if your respondent group is very small.

- If you want to compare feedback from different towns and villages, then select the first item. NOTE: This will probably not be so important for a partner survey, but will be useful when comparing feedback from target beneficiary groups.
- If you want to compare feedback from a whole district or province or county, then select the second item.
- If you think it would be useful to compare feedback of people in different age groups, select **Age**.
- If you want to compare what men and women say, then select **Gender**.
- To compare feedback of management vs. field staff then select **Position in Organization**.
- To compare the views of people who have been in the program a long time with those who have recently joined, select **Time working in program**.

Step 9. Introduce your survey



If you want to send the survey out by email (using the Feedback Commons campaign tool – see next page), you should include a short introduction to your survey so that they know what it is about.

In this text box we have created some sample text that you can use if you want to.

You can use it as it is, or you can modify it and add your own words. You can even replace it entirely with your own message.

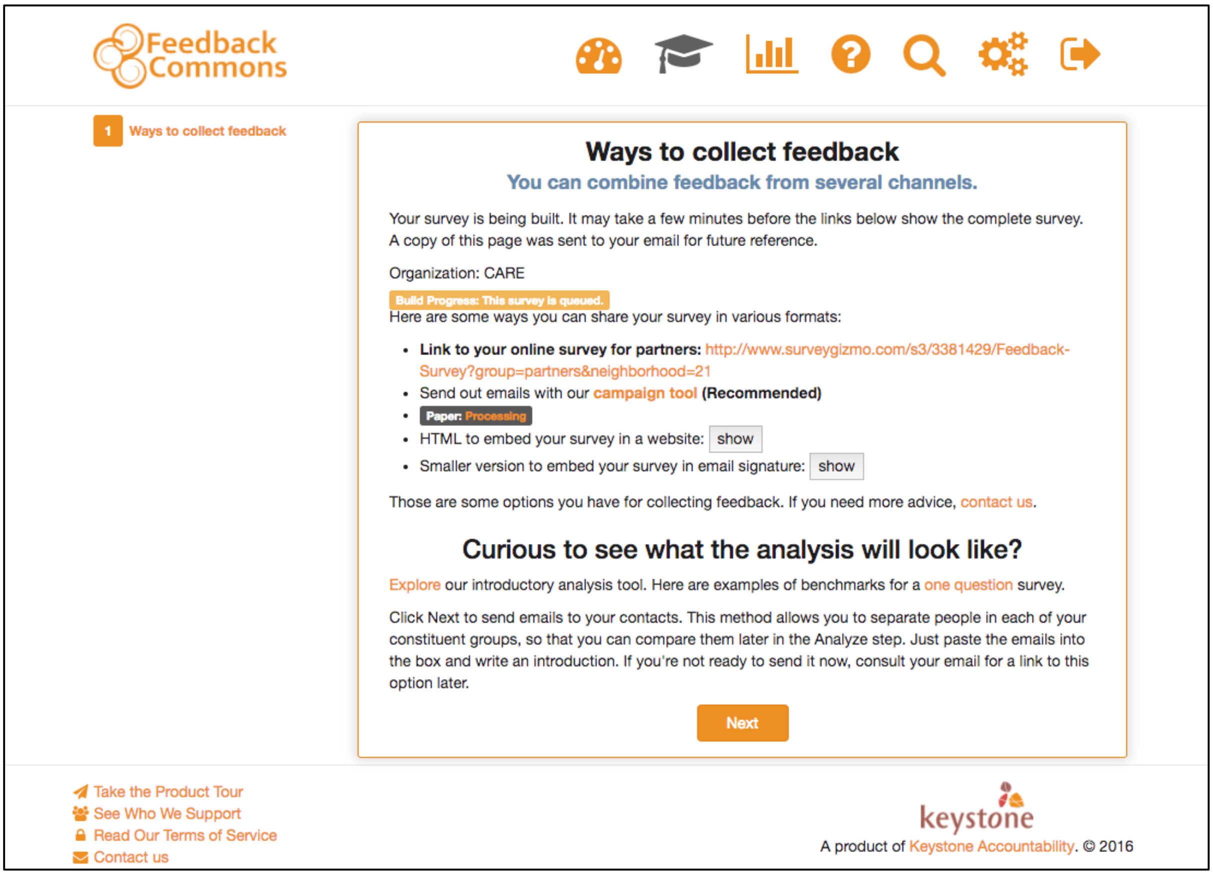
When you are happy with your introductory message, click **NEXT.**

You will then be taken to another part of the Feedback Commons as your survey is built.

NOTE: We recommend that you do not include any introductory message if you are going to print your survey and use Community Feedback Collectors. If you do not include a message your survey should (unless you have too many questions) print on one page, whereas with the message it requires 2 pages.

Now wait while your survey is being built…

As your survey is being built (it can take 2-3 minutes) you will see this screen:



Once it is completed, the orange box will change from Build progress: This survey is queued

to a green box that says Build progress: This survey is ready to use.

Now choose how you wish to send the survey out. At this stage, we recommend only two options:

- If you want to use email, select our **campaign tool**.
- If you want to print a paper survey form to collect feedback manually, then select **Paper…**

If you choose the **campaign tool…**

- you will be asked to enter the email addresses of all respondents, so make sure that you have a list of email addresses separated by commas, or enter them manually into the space provided on the next page.
- The survey will be sent automatically to all the email addresses. And their responses will be automatically captured in the Feedback Commons.

If you choose **Paper…**, the survey builder will create a WORD file that you can save on your computer and print copies.