NREIC | National Race Equity Implementation Center

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A Comprehensive Guide for Best Practices in Engagement Survey Administration

Introduction

Administering engagement surveys to participants of evidence-based programs requires intentional and careful planning. The survey process must take into consideration program outcomes and participant motivation. At CYC, our surveys collect valuable and actionable data to inform quality improvement and provide deep cohort insight. Engagement surveys may vary across programs but share the same domains.

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Engagement as a Top Tier Fidelity Factor

From over 25 years of experience delivering evidence-based programs, we know that engagement is a top tier fidelity factor. Both program participant retention and attendance are leading indicators for engagement, and we measure overall participant and facilitator engagement as regularly, and with as much weight, as we measure adherence to and dosage of the program. The analysis of engagement allows for the identification of "what works" early in program delivery to improve the conditions for meaningful participant involvement throughout the delivery of the program.

Participant engagement is defined here as an emotional involvement or commitment by a child, youth, family member, clinician, or facilitator as it relates to their experience with or in an evidence-based program.

While there are many strategies and factors that improve engagement, we believe that content relevance is paramount. Does the program contain content that is relevant to the lives of children, youth, and families? Is the content delivered in a meaningful way? And do those delivering the content share the same experiences as the participants they are working with?

Engagement occurs for all involved when people have invested themselves, their energy and their commitment to the learning environment, both within and outside the program. Participants willingly put forward the required effort to find a level of personal success both socially and emotionally. They care about the success of others and contribute meaningfully to the program climate. Children, youth, and families understand that their presence matters.

Engaged participants are more likely to actively participate in programs and are highly motivated to apply the skills they've learned. If a person is interested in the topics being taught and the enabling context has been set, attendance, retention, and participation become far less prominent barriers to learning.

Important Elements of Usable Surveys

Clarity

- Instructions should be clear and concise so that participants understand the objectives of the survey and understand what is being asked of them. It should be a transparent process.

Reliability

- Administration of any new survey should be piloted with a small group to identify potentially confusing questions, repetitiveness, and other challenges with administration. Information from the administration of previous and valid surveys can be used to guide this process when administering a new set of questions.

Format & Accessibility

- The format, layout, look and feel of a survey is not to be underestimated. Does the survey look busy? Are the colors accessible for those with vision issues, is the font the appropriate size? Does the survey flow or is it all over the place, is it too long? All of these elements, when done well, play a big part in captivating the attention and motivation of participants to engage with the survey itself. With format also comes the question of administration avenues; is the survey digital or pen and paper? Whether on paper or digital, formatting and ease of use is critical. Furthermore, considerations should be taken to guarantee that participants have Wi-Fi and electronic device access and are also able to take the survey regardless of physical ability.
- For digital surveys, ensure that participants know how to interact with the survey and know what the process is for completing and submitting the survey. Let participants know that the survey is not submitted until they click "done".

Literacy

- Data can easily be invalidated if participants do not understand what they are filling out or why. This leads to unusable data. Attention should be paid to the population's literacy levels, native language and language proficiency. In bilingual settings, surveys must be translated to ensure that participants have equitable access to voice their opinions.
- Specifically with Spanish-speaking populations, there is often a barrier with literacy even if the survey is administered in the participants' native tongue, in these cases, a facilitator should be provided to verbally walk participants through the questions for understanding. Different examples should be used for questions when participants ask. Go slow if needed; it is important that participants fully comprehend the questions.

Confidentiality & Trust

- When administering surveys, providing context and 'setting the table' for participants increases data validity. Ensure that participants are clearly aware of the purpose of the survey for program improvement, how the data will be used to their benefit, and assure them that their responses are confidential. Let participants know that their named or coded responses will not be identified to the facilitators, but that data will be presented in aggregate form to the facilitation team to improve practice.
- In lieu of providing names when required for a particular survey, surveys can be pre-coded internally for each participant. These codes vary from program to program based on several factors and based on the needs of the administering team for internal use. An example of codes used at CYC typically uses the participant initials, a cohort identifier and another identifier such as the cohort year (XYJH2023). This coding is used to track pre/post surveys by matching the identifying codes. Participants are more likely to be honest and open with feedback when they feel that there will be no repercussions for their honesty and when they know that their information will be kept confidential.
- Encourage participants to ask for help and provide one-on-one support as needed. Project Managers should note which questions participants need one-on-one support with over time. Gathering this information over time will guide revisions to the survey when necessary.
- Attention should be paid to "who is in the room" when administering engagement surveys. For example, in a survey that asks questions about relationships with a particular facilitator, ensure that the facilitator is either not in the room, or is positioned away from the survey takers. The body language of the facilitators is also important for relaying trust.

Timing & Frequency

- Timing: Each program's schedule is different and there are sometimes challenges with finding the time to administer a survey without rushing participants. Survey administrators, typically facilitators, should review program schedules and align the timing of delivering the survey so that it is conducive to the day's schedule and program timeline to avoid rushing participants and ensuring that the right time frame is captured. Surveys should be administered periodically and spread out in equal increments throughout a program's timeline. Periodic administration helps to track changes over time and provides insight on challenge and success points as well as quality improvement guidance over the course of a cohort (a cohort is defined as the group of participants within a specific program timeline).
- Dosage as a factor in understanding survey data: Special attention should be paid to dosage by each participant. If today is session 3 and the first engagement survey is to be administered, facilitators should separate the completed surveys of any participant that has attended less than two sessions by the end of session 3. If this data is not separated then the data as a whole may be invalidated as the participant will have had much less exposure to the program.
- Ensure that participants are aware of the specific time frame they should consider when responding to the survey. If you are trying to cover engagement over the last two weeks, make sure that participants understand that they must reference the last two weeks.
- The goal is to see growth over time as the survey is repetitively administered. Teams should not be discouraged if results are not as positive as desired at first administration with any cohort as participants are fairly new to the program and different individuals take varying levels of time to feel comfortable, especially in communities of color. Note that with questions, such as in the GROUP relationship domains, you may not see immediate gains in first administration but should see the gains over time, especially by the second administration.
    - If a participant has missed too many sessions in between engagement survey administration, they will not be adequately familiar with the program content or activities and their responses will not reflect the intended experience in the program.
    - Including participants that have missed a significant part of the program can potentially skew data and make interpretation of the data more challenging.
    - Alternatively, survey administrators can consider a separate interview with low-dose participants to gauge the reasons for their absences and see if the implementation team can remove any barriers for the participant.

Data Analysis & Reporting

- When a participant invests their time in providing feedback, that feedback should be acted upon and relayed back internally and externally in meaningful ways. Data, when used properly, helps to paint a picture of the cohort so that managers can make connections to what they are seeing within groups reflected in the data. Making connections between data and on the ground experiences is beneficial in identifying strengths and areas of improvement for improving satisfaction and in turn increasing program outcomes.
- Engagement data should not be reviewed in isolation of other elements, but should be the centerpiece that centralizes and affirms all other available data inputs: both quantitative and qualitative. An example of a data input that goes hand in hand with the engagement survey is a facilitation debrief form that is submitted by facilitators after each session, either online or in paper, to the Project Manager.
    - A debrief form would include questions that gauge participant engagement from the facilitator perspective. This data helps to create a bigger picture of the cohort and allows facilitators to see the difference in their perception versus that of the participants.
- Results should be shared with relevant stakeholders, from the participants, to the management team, and beyond to the community. Quick turnaround of this data is needed for effective feedback loops that are responsive to the findings. The data allows for shifts to be made in a timely manner to produce better results on subsequent engagement surveys.

Continuous Quality Improvement

- Engagement surveys are part of ongoing continuous quality improvement and need to be regularly revised to improve the effectiveness of the program that participants are involved with. Data should be revisited to identify patterns within cohorts over time. The survey itself should be revisited regularly to ensure that it is updated or adapted when the data has effects on adaptations and/or changing program needs.
- Regularly revisit surveys to reflect relevance, improve engagement survey process and ensure reliable and valuable feedback. Attention should be paid to the effectiveness of the questions, the way the questions are asked, and the survey format itself. This also ensures opportunities to identify areas for improvements and innovation in design, data collection method and reporting procedures.

CYC's Engagement Survey Approach

When and how frequently is this survey administered?

- In a typical 7 to 12 week program, the in-program engagement survey is administered three to four times in equal increments, with the first being administered at session 3. For example, Strong African American Families Program (SAAF), a 7-week program with an orientation, the survey is administered at the end of sessions 3 and 5, with a final survey at session 7.
- The final Engagement and Satisfaction survey is administered during the last session, typically called the graduation session.
- The in-program engagement survey asks participants to reflect on the last two weeks of the program while the final engagement and satisfaction survey asks participants to reflect on the entire program experience.
- The timing of administration varies by program and is based on each program's agenda. Best practice is to administer the survey in-person, at the end of a session to capture a greater amount of engagement experience.

What is the purpose of this engagement survey, what does it measure?

- In providing high quality, evidence-based programs, the CYC uses an engagement survey to paint a picture of each cohort. Monitoring engagement early allows us to pivot and make changes quickly and effectively in response to participant feedback. We know that greater participant engagement translates to better outcomes and better results. The survey measures participant engagement within the following domains: Cultural Relevance, Application of Learning, Leadership & Support, Group Relationships, and Open-ended Feedback.

Who should take this survey?

- All participants currently receiving a program that you deliver should take the survey; this includes youth in community programs.
    - When there are multiple caregivers present in programs, make sure all caregivers fill out the engagement survey.
    - *Exception:* Special attention should be paid to dosage and frequency of attendance by each participant. If today is session 3 and the first engagement survey is to be administered, facilitators should separate the surveys of any participant that has attended less than 2 sessions by the end of session 3. Why? Because this may cause invalidation in data as the participant has a much smaller exposure to the program.

How long does this survey typically take to complete?

- This will all depend on the literacy level of your participants.
- The engagement survey has 16 multiple choice questions, two open ended questions, and a comment box for additional feedback.
- The survey can take anywhere from 5-15 minutes depending on comprehension level.

CYC's final engagement survey includes satisfaction and varies across programs.

Where and how long is data stored?

- Digital data is stored in the Qualtrics Online Data Platform and Physical paper surveys are securely stored on-site at our central office. All data is kept for a minimum of five years.

Who is the administrator of the survey?

- Facilitators for each respective program are the administrators of surveys in programs.

What happens if a participant misses a survey in person?

- If a participant misses an in-person survey, two methods can be employed.
    - Facilitators can administer the survey to a participant at the beginning of the next session and ensure that the participant has time and privacy to complete the survey.
    - On a case by case basis, and depending on the literacy and access of the participants, facilitators can send a digital survey link to the participant to fill out remotely or convene a virtual meeting to support the participant filling out the survey.

How is the data collected and used?

- Historically, CYC used paper form surveys and has now switched to a digital survey platform, Qualtrics. Paper surveys are still used for participants with accessibility and literacy barriers.
- Upon collection and processing of these surveys, data is used to respond to barriers in program delivery and for enhancement of the program. This data can further inform best practices in facilitation and contribute to the continuous improvement cycles of programs. These surveys also serve as an indicator of quality and contribute to the accountability of the program implementation team. Although this is just one data point, results from engagement surveys serve as indicators for whether facilitation and program delivery are going well and identifies where there is room for improvement.
- This is done by leveraging effective implementation teams to integrate peer coaching and evaluation systems that use engagement data to assess each other's contributions and accountability. This helps to identify where further supports need to be installed and identifies leaders within implementation that provides a balance between accountability and fostering supportive team culture to drive program success. This ensures that teams are fully committed and responsible for achieving their objectives.

What is the data turnaround process?

- Planning in early stages prior to survey administration is important to ensure that data can be used within a reasonable timeframe and within a feedback loop.
- Participants enter their responses into the Qualtrics platform, or if the participant completed a paper version of the survey, the facilitator ensures that data is then entered into the Qualtrics platform.
- This data is then brought to the internal project management team at CYC for review within one week.
    - The internal project management team input suggestions for the data.
    - Depending on the urgency of the need to shift based on the data, this information can be relayed to facilitators and then to the implementation team to further discuss the data and to plan a response.
- This is done by leveraging effective implementation teams to integrate peer coaching and evaluation systems that use engagement data to assess each other's contributions and accountability. This helps to identify where further supports need to be installed and identifies leaders within implementation that provides a balance between accountability and fostering supportive team culture to drive program success. This ensures that teams are fully committed and responsible for achieving their objectives. Planning in early stages prior to survey administration is important to ensure that data can be used within a reasonable timeframe and within a feedback loop.

- Participants enter their responses into the Qualtrics platform, or if the participant completed a paper version of the survey, the facilitator ensures that data is then entered into the Qualtrics platform.
- Rapid, data driven decision making is crucial for improving participant experience, facilitation and improved outcomes
- This data is then brought to the internal project management team at CYC for review within one week.
- The internal project management team input suggestions for the data.
- When the data relays an urgency to shift practices based on the data, this information can be relayed to facilitators directly and then to the MONTHLY implementation team to further discuss the data and to plan a response.
- The implementation team responds to the data.
- In normal, non-urgent data processes, the data goes straight from the project management team to the implementation team. These teams, which include facilitators, use the engagement data, along with other data, to monitor, adapt and enhance implementation strategies.

Sample Scripts

Today, you will be taking an engagement survey to gather information about your feelings and experiences with [PROGRAM]. Please choose one answer for each question, and try to avoid skipping any questions. When you have completed the survey, we will learn a lot about how you engage in [PROGRAM], what you feel is important in [PROGRAM], and how we can improve the experience for you and for families that join in the future. Your answers are completely confidential and will be used to help us improve the quality of this program for your family and future families. Please answer each question honestly.

There are no right or wrong answers. Choose one answer that best describes you; your answers will be confidential. We value your privacy and as facilitators we will not see your answers directly. The codes you see on the survey help us match surveys and be able to see individual satisfaction over time. We will only see the data without your name or identification.

We are here to assist you and make this the best experience for your family. Please call over a facilitator if you have any questions or need help filling this out.

Do you have any questions before we begin? Thank you for your input.