Public Opinion Research Planning

This document outlines the process and key considerations when designing and fielding public opinion polls. A question library, report examples and a sugary drink survey scan are also available.   If you need resources or have questions, please reach out to the Voice's Policy Research Manager, Phil Noyes (philip.noyes@heart.org).

Content

Public Opinion Research Planning

Grantee Public Opinion Research Checklist

☐ 1. At the beginning of your grant fill out the Public Opinion Research Project Form and the Dissemination Form. Submit the completed forms to the Policy Engagement Manager (PEM), who will share them with the Policy Research Manager (PRM) and the Media Advocacy Manager (MAM).

☐ 2. At least one month prior to when you plan to conduct your Public Opinion Research schedule time to discuss with your PEM and the PRM. Determine if there are lobbying concerns and schedule call with legal counsel if necessary.

☐ 3. In consultation with the PRM, select a vendor and draft a contract. Share contract with PRM.

☐ 4. Develop and submit draft survey questionnaire or discussion guide to the PRM for feedback. Ensure that the dissemination plan addresses which questions will be available for public release and consider order of questions.

☐ 5. Working with the PRM and the vendor develop the final version of your survey questionnaire or discussion guide.

☐ 6. PRM will submit the final version to the American Heart Association legal department for final approval and notify you of project sign-off.

☐ 7. If your project has two parts, i.e., focus groups (Part A) and a poll (Part B), explain how Part A influenced Part B through a memo and a call with the PRM and your PEM prior to finalizing Part B.

☐ 8. Conduct the Public Opinion Research.

☐ 9. Schedule time with PRM, PEM and vendor to discuss findings and review preliminary report.

☐ 10. Schedule time with MAM and PEM to discuss implementation of the dissemination plan and to review campaign messaging.

☐ 11. Submit all results and project deliverables to the PRM and your PEM within 60 days of the completion of the poll.

☐ 12. Get public facing documents and presentations for release of results approved by Voices for Healthy Kids through your PEM.

Public Opinion Research Planning

Planning & Preparation

Early Planning and Vendor Selection

The goals of the research should inform the questions asked in the survey and also the criteria you use to select a research partner. Most importantly, what are you trying to understand and to what end?

From there, it will be important to identify a partner who has experience in the geography of interest, as well as one who has conducted research in service of similar goals. Both geographic experience and prior work on the specific policy issue will likely mean that a research partner has some foundational understanding in the locality or state, which will be instructive when designing the actual survey questions and during analysis.

The political disposition of a research partner should be part of the selection criteria, too. Some vendors maintain complete independence, choosing to conduct research that is entirely nonpartisan in nature. Others tend to have a political slant, whether it be right- or left-leaning. These vendors often work with organizations that may be branded as having a political point of view. If the goal is to present nonpartisan research, then it will be necessary to select a vendor that will be seen as unbiased and independent. However, if the results of the poll are intended for a specific audience, choosing a vendor that leans one way politically may be beneficial. If the goal is to present research to both Republican and Democratic lawmakers, it may be most helpful to have it branded as bipartisan. This will require selecting two firms that will work in partnership with each other, which is a common practice on some topics related to children (e.g., education, health.)

The American Association for Public Opinion Research (AAPOR) can also serve as a resource when beginning to plan for research and engaging a partner. AAPOR, the leading professional organization of public opinion and survey research professionals in the U.S., maintains a Code of Professional Ethics and Practices. The Code "sets the standard for the ethical conduct of public opinion and survey research at the time of publication," including how research is presented to participants, how to manage personally identifiable information about research participants, and best practices for full and complete disclosure of research methods when results are shared with a client and/or the public.

Survey Considerations

There are several variables to consider when planning for a survey:

- **Survey mode.** How will the survey be administered (online, phone, or both)?
  If any part of the survey is administered by phone, it is also important to determine the number of respondents that will be reached via cell phone and landline.

Public Opinion Research Planning

- **Sample size.** How many people will the survey reach?
  When determining sample size, it is important to consider the size of the population of interest and also how much subgroup analysis will be conducted after fieldwork.
- **Composition of the sample.** Recent surveys about sugary drinks and an associated tax have been fielded among three different groups: adults 18+, registered voters, and likely voters. Since Voices for Healthy Kids and partners are looking to demonstrate support to policymakers, one of the voter options will likely make the most sense, with the likely voters approach often working best when an election is approaching.
- **Language.** If you are conducting research in a community that includes a large Spanish-speaking population (either Spanish-language dominant or bilingual), it is important to make the survey available in a language other than English.
- **Survey length.** The length of the survey establishes guardrails around what can be covered in a survey. Shorter surveys are better as respondent dropoff is directly impacted by the length of the survey: longer surveys have greater dropoff.

If the goals of the research are clear, your selected survey partner should be able to make recommendations on each of these variables. These are also the variables that will impact the cost of the survey. For example, surveys conducted by phone are more expensive than online surveys. Survey mode is typically the biggest predictor of cost, but the other variables will also have some impact on the total cost of the research.

Survey Design Considerations

The goals of your research should guide what topics are covered in the survey. With a sugary drinks tax campaign in mind, following are some broad topics that could be covered:

- General attitudes on tax increases
- Preferences on how to manage budget shortfalls
- Preferences on how to promote healthier habits within communities/role of government
- Awareness of what constitutes a sugary drink
- Awareness of and/or concern about the health impact of sugary drinks
- Support for a sugary drinks tax
- Messages to drive support for a sugary drinks tax
- Messages that the opposition might use
- Individuals and groups that have influence when speaking about sugary drinks (trusted messengers)

Public Opinion Research Planning

Survey Review and Preparing for Fieldwork

Most vendors allow for at least two rounds of client review and edits on the actual survey. This is often (but not always) outlined in the agreement between the vendor and client. If you think you will need more than this, though, make sure to communicate how extensive review periods will be on your end (how much time you will need, how many people - beyond the core project team - will be reviewing different drafts of the survey).

The Survey Review Checklist should be a useful guide on what to look for when reviewing a survey. Additionally, the following steps will likely help make moving from survey review to fieldwork as seamless and expeditious as possible:

- **Communicate fixed milestones early**. If your team needs survey results by a certain date, ensure that the review and fieldwork timelines can accommodate any potential delays and also time to pretest the survey.
- **Make it easy for the vendor to track and incorporate edits.** Consolidate edits and resolve internal questions prior to sharing feedback with the vendor
- **Leverage vendor expertise.** When necessary, use the vendor to help resolve conflicting edits
- **Be mindful of survey length when suggesting additions.** If you want to add questions to the survey (or answer choices to an existing list), consider what you might cut to make room for these changes

Vendor Alignment

In initial conversations with vendors or when developing a research RFP, it is critical to have clearly defined goals for the research. Early alignment on these goals will ensure that research findings can be used to advance specific conversations or policy objectives. These goals will also make it easier for vendors to recommend a customized research plan and accompanying set of deliverables.

When developing research goals, consider the following:

- **Primary research questions.** What are the key questions that need to be answered and/or hypotheses that need to be tested?
- **Intended application of final data.** How do you intend to use the results of the research *and* how, if at all, do you intend to distribute those results?
- **Desired consumer of research.** Who is the intended audience for the research results (including if you intend to use the research for lobbying purposes)?
- **Preferred format(s) for presentation of results.** Are there any particular assets or resources you will want to create to engage your intended audience(s) (e.g. social posts, infographics)?

- **Timeline.** How quickly do you need the results of the research and are there any particular milestones or dates where the research would need to be available?

Guiding Development of Research Questions

Typically, your selected research vendor will develop a first draft of the research instrument (poll, survey, or focus group guide). If there are particular questions you want answered or plan to recommend, consider the following:

- **Purpose.** Is this a nice to know or need to know question?
- **Redundancy.** Is this topic already covered or explored elsewhere?
- **Use case.** How do you plan to use the results of this question? What kinds of statements do you want to make with the results and about what groups (e.g., the total sample, specific subgroups of the community you are conducting the research among)?
- **Public release.** How comfortable are you releasing the results of this question publicly and/or sharing the full research instrument?
- **Potential cuts.** If you are adding a question after reviewing the first draft of a research instrument, what question()s) could you cut to make room for the addition?

Public Opinion Research Planning

SURVEY REVIEW CHECKLIST

Your research partner will develop a survey for your review based on agreed-upon goals and target audiences. This checklist outlines some best practices in survey design and is intended to help guide your review of a survey.

Question stem
(*The actual question or lead-in text respondents will hear or see when taking a survey)*

- ☐ One idea per question
- ☐ Potential bias

Answer choice types
(There are different types of answer choices that respondents see when taking a survey, including but not limited to single-select, where respondent are only allowed to pick one answer from a list; multi-select, where respondent are allowed to select more than one answer from a list; and open-ended, where respondents are provide their own answer rather than selecting from a list)

- ☐ No overreliance on one answer type
- ☐ Most questions are close-ended
- ☐ Response options are mutually exclusive
- ☐ Single-select and multi-select questions are clearly used and differentiated
- ☐ Number of answer choices is limited (phone surveys: ≦6; online surveys: ≦8)
- ☐ Yes/no questions are only used when it is not helpful to understand gradation
- ☐ Consistency in Likert scales[1] (e.g., one scale is primarily used throughout)
- ☐ Clarity in Likert scales (ends and points between are clearly labeled and understood)
- ☐ When using an odd numbered Likert scale, confirm middle position is important to understand (or,

[1] A Likert scale is a rating scale that measures strength or intensity of an attitude, opinion, or behavior in a linear and balanced way. Some but not all may be labeled. Examples of 4-, 5-, and 7-point Likert scales: 1) 4-point labeled scale - strongly agree, not so strongly agree, not so strongly disagree, strongly disagree; 2) 5-point labeled scale - strongly agree, not so strongly agree, neither agree nor disagree, not so strongly disagree, strongly disagree; 3) 7-pt labeled scale - completely agree, mostly agree, somewhat agree, neither agree nor disagree, somewhat disagree, mostly disagree, completely disagree; 4) 7-pt scale with labels at end points only - 1 = strongly disagree, 7=strongly agree.

will many just default to the middle rather than take a position?)

- [ ] No more than two open-ended, verbatim questions
- [ ] Instructions for number type are clearly provided for numeric answers
- [ ] For phone surveys, “don’t know” should be a voluntary/not read answer choice; for online surveys, “not sure” should be used deliberately and sparingly
- [ ] Sensitive questions, such as household income or race, include a “prefer not to answer” option

Randomization and rotation

- [ ] Question components (e.g., messages or messengers) are presented in a randomized order
- [ ] When appropriate, answer choices are presented in a randomized order
- [ ] Pairs of questions testing alternatives (e.g., potential use for revenue) are rotated
- [ ] Supporting and opposition messages are rotated in the way they are presented to respondents (e.g., half see supporting messages first, half see opposition messages first in an effort to neutralize any bias in survey data based on the order in which messages are presented to respondents)

Other considerations

- [ ] Language used in question stem and answer choices is accessible (pretesting can confirm this)
- [ ] If intent is to measure change over time, questions and answer choices should be consistent
- [ ] Split sampling used when survey sample is sufficiently large and clear alternatives to be tested