GROW GRANT STANDARDIZED SURVEYS: PLANNING WORKSHEET

OTF requires certain Grow grantees to use standardized surveys with their program participants. OTF wants to understand how our investments are resulting in the intended changes in communities.

OTF has commissioned Forum Research Inc. to support Grow grantees in administering standardized pre- and post-survey tools which will help your organization get a full picture of the impact your project is having, and to learn more about what works and what doesn't. Forum is a respected research firm with experience working with communities across Canada.

The information gathered will be anonymized and aggregated to help OTF understand the overall impact of its investments. This valuable information may also help your organization tell the story of your project's impact in the communities you serve.

How to use this planning worksheet

- Table 1 contains an optional survey planning worksheet to help you administer your Ontario Trillium Foundation surveys with your program participants
- Table 2 contains a sample template to help you schedule when you will administer the surveys

Key things to know about administering the Grow Standardized surveys

- Within a week of your organization returning the signed Grant Contract to OTF, the Forum Research Help Desk will contact the Primary Contact for your organization (the person who signed the Grant Contract). Forum Research will send an email providing login details and support for the online Evaluation portal. The Evaluation portal will allow you to track the results of the surveys you have administered.
- Read the Frequently Asked Questions about these Grow Grant surveys.
- For technical questions related to administering the survey, please contact Forum Research at 1 866 980 0467 or otfsurvey@forumresearch.com. A representative will respond to your inquiry within 12 business hours.

Please contact your OTF Program Manager directly to discuss any questions/concerns regarding your planning and this toolkit.

TABLE 1: SURVEY PLANNING WORKSHEET		
Item	**Response**	***Notes (questions, additional info needed, action items)***
Select your OTF Grant Result		
OTF standardized survey associated with your Grant Result	Read more about the Grow Grant Survey Tools (pdf) Click and choose from the drop-down menu below 	
Primary person(s) responsible for implementing the surveys	*Who will be accountable for ensuring that the survey administration requirements are met for your OTF grant? (This person may be a staff/volunteer, someone at a partner organization, an evaluation consultant, etc.). This person should be given access to all survey information and documents, including login credentials to the Forum Research survey portal and contact information for the OTF Program Manager monitoring the grant.* *How will this person coordinate with the person responsible for reporting on the grant, to ensure that progress is made and communicated in a timely manner?*	
Population to be surveyed	*This should correspond to the beneficiaries identified in your Grant Result. E.g. If your OTF grant supports the expansion of a program to seniors in two additional neighbourhoods, the population identified here should be "seniors in the two added neighbourhoods who participate in program activities." Program beneficiaries not supported by OTF funding should not be included in the sample for the OTF standardized survey.*	
Survey language(s)	*Note: Please inform your OTF Program Manager if you need to provide the survey in languages other than English and French. OTF may be able to provide professional translation(s) of surveys where needed.*	

How will surveys be administered? (e.g. email, paper[1], tablet[2], laptop, face-to-face interview)	*Given the population that you are working with, and the schedule of activities you will deliver, what are the most appropriate ways you can gather survey responses to capture the impact of your activities? This may include a combination of different methods, to cater to different populations and activities over the course of your grant. Keep in mind that while getting more responses will lead to greater confidence in the results, getting responses from a variety of your beneficiaries is also very important!*	
Anticipated challenges or barriers to survey administration	Challenges:	Solutions:
Remaining questions about the OTF survey requirement		

1. Paper Surveys: If you decide that administering hard copies of the surveys is the most appropriate for collecting data for your population, please contact the Forum Help Desk. The Help Desk can provide an electronic email attachment of the survey, and/or courier hard copies of the survey to you. Once you have collected completed surveys, Forum Research can assist with data entry. To arrange for the data entry service, please contact the Forum Research Help Desk to discuss what information you need to provide for them to assist you.

2. Tablets are available on loan from Forum Research. Please contact the Forum Research Help Desk to request a tablet. You will be asked to complete a tablet loan contract with the start and end dates of your program.

Schedule for Administering Surveys

The table below can help you plan the timing and response rate of your survey administration activities.

The most appropriate schedule for administering your surveys will depend on your project's theory of change (i.e. how the activity or activities contribute to achieving your selected OTF Grant Result). Some programs consist of a single activity (e.g. a weekly skills training program spanning 3 months), while others provide a menu of activities (e.g. six different afterschool activities offered throughout the school year). In each case, we recommend that you identify the unit of activity or activities that, as a package, work towards achieving your Grant Result.

An important consideration for measuring impact over time is how individuals' responses will be tracked over the course of an activity. Do you have a Client ID, or some other anonymized method of linking a person's pre-survey responses to their post-survey responses?

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You may use a tracking code (any combination of numbers and letters) of your choosing to link pre- to post-surveys.

If you have questions or concerns about completing this table, please contact your OTF Program Manager, who will be happy to assist you.

TABLE 2: SCHEDULE FOR ADMINISTERING SURVEYS						
Activity/Cohort Name	Brief Description	Activity duration (mm/year) – (mm/year)	Pre-survey date (dd/mm/year)	Mid-survey date (dd/mm/year)	Post-survey date (dd/mm/year)	Target Number of responses
EXAMPLE: Seniors choir	*Bi-Weekly choir to facilitate connections amongst mobility-restricted seniors*	*01/2016 – 03/2018*	*23/01/2016*	*18/07/2017*	*10/03/2018*	*56 surveys each (168 total)*

Activity name: Identify and list OTF-funded activities that directly contribute to achieving your Grant Result.

Brief Description: Describe the structure, frequency, and duration of each activity. This will help determine the timing and frequency of surveys needed.

Pre-survey date: The first time you administer the survey, typically the first time a new beneficiary attends an activity or event, to establish a baseline.

Mid-survey date: This is optional, but encouraged for activities longer in duration (e.g. for a 12 month activity, we recommend administering a mid-point survey at 6 months).

Post-survey date: Administered at the end of an activity, to provide a comparison against the pre-survey to measure impact. This may be on the last day of an activity, or in some cases, during a follow-up some number of weeks after the activity end date (e.g. for employment training programs).

Target Number of responses: Based on expected attendance and factors such as availability of time, how many responses do you expect to receive for each of the pre/mid/post surveys you will administer for each activity?

Additional considerations

If your beneficiaries participate in numerous activities over the course of several months (e.g. over a school year), you do not need to survey them at the beginning and end of every activity. It is sufficient to administer a pre-survey at the beginning of their participation, and once again at the end of the time period (e.g. at the end of the school year, or at discharge).

Some activities may not happen regularly, but are available on a drop-in basis. For these, consider whether it makes sense to administer surveys on a rolling basis, or on pre-determined days (e.g. at the start of every month). Considerations may include the availability of time and resources for administering the surveys, timing and volume of intake of new beneficiaries, and discharge of existing beneficiaries, and quality of data you will be able to collect.