

## *Conducting Aging Well Resident Surveys*

AGING WELL IN COMMUNITIES: A TOOLKIT FOR PLANNING, ENGAGEMENT & ACTION

*A survey provides detailed quantitative information about what boomers need and want from the community. This information can, in turn, serve as a key guidepost for future policy and planning efforts.*



A Center of the Public Health Institute

## Introduction

Developing and conducting a resident survey is an important action for communities working toward determining and meeting the needs of their older adult population, both now and in the future.

## What is a Resident Survey?

A survey uses a questionnaire format to obtain quantitative information from a specific population, or group of people. Survey questions are closed-ended and measurable. Survey results are typically expressed in numbers or percentages.

Unlike a focus group or public forum, an aging well resident survey will not produce in-depth, qualitative information about how residents feel about particular issues, nor will it allow residents to voice opinions and thoughts on broad topics and issues. A survey will, however, provide detailed information about what older adults need and/or want from the community. Communities may conduct a survey prior to holding a public forum or focus group. Or communities may convene a public forum and then decide to conduct a resident survey based on community-wide feedback. Or a resident survey may be the first step a community takes, providing a core foundation on which to build a larger planning and community development process.

Before you conduct an aging well resident survey, we strongly recommend that you review “Community Planning for Aging Well: An Overview.” It discusses key foundational elements of a successful aging well planning process, including:

- Understanding how planning for aging well in the community is different from other planning efforts
- Deciding what role local government should play
- Forming a broad-based, representative planning committee
- Choosing language that will attract boomers and engage them in your effort

- Developing cultural competence
- Gathering data from your community
- Reporting and using your results

**Advantages of resident surveys** As with other activities related to preparing for aging communities, a survey encourages residents to think about what their lives will be like and what they may need in the years ahead. The survey is prospective—it does not look backward or assess current needs.

Asking residents to think about their own aging can be challenging, because people are often reluctant to discuss growing old and tend to avoid thinking about the declining health or loss of independence that may accompany old age. By offering structured, constructive ways for older residents and the larger community to consider and plan for healthy aging, local governments can fill an important role.

A survey helps local governments:

- Determine their “aging readiness” at a time when increasing numbers of boomers are expected to remain in their communities as they grow older
- Understand residents’ expectations about the role local government should play in providing “age-friendly” or “livable” community services and policies, particularly in the areas of housing, transportation, and land use
- Identify areas where administrators may need to allocate resources or focus planning efforts
- Inform the general planning process and updates to elements of the general plan
- Educate residents about planning ahead and aging in the community (in their own homes, if desired)
- Foster greater civic engagement and community involvement among older residents
- Move the aging well planning process forward with key community input

- Create a collaborative process rather than an effort owned and directed by local government. According to a [comprehensive survey guide](#) from the International City/County Management Association (ICMA), “More than three-fourths (78%) of managers reported using citizen surveys to guide policy decisions, nearly two-thirds (64%) to set strategic goals, more than half (65%) to evaluate programs or policies, and nearly half (44%) to allocate resources.”

#### **Caveats about resident surveys**

- The effectiveness of a survey depends on its design and the types of questions it asks.
- Surveys assess what participants say, but cannot determine how they will act.
- Survey results should not be generalized to the target population (older adults) if the survey did not reach a representative sample of that population, or if there was a high non-response rate among potential respondents.

#### **Before the Survey**

For your survey to be successful, you must have a clear sense of what you want your survey to accomplish. Accordingly, we recommend that you first form a planning committee (see “Community Planning for Aging Well: An Overview”). The planning committee should establish the overall goals for the research effort, along with specific goals for the survey. The committee can then pass on these goals to local government and other stakeholders. You can then work with the planning committee, local government officials, resident commissions, and, if possible, a professional survey consulting agency to determine what information you want to get from the survey. Planning committee members can also serve as ambassadors for local government. Using the resident survey process as a rallying point, they can promote the importance of civic engagement and volunteerism, and call attention to important community development and land use issues.

#### **COMMON SURVEY TERMS & DEFINITIONS**

**Sample:** The subgroup of a target population. It identifies who and how many people are being surveyed (e.g., 10% of city residents between the ages of 45 and 60).

**Technique:** The method for conducting the survey (e.g., paper, web-based form, telephone, or in-person interview).

**Respondent:** The individual who is providing responses to your survey (e.g., a person in the sample group who completes and returns the survey).

**Field dates:** The time period during which the survey is conducted (e.g., dates of distribution and return).

**Data collection:** The process used to gather specific information about the target population (e.g., paper survey mailed to residents asking questions about specific topics).

**Open-ended question:** A type of survey question that allows people completing the survey to answer in their own words. (e.g., “What types of volunteer activities do you enjoy? Please write your response below.”)

**Closed-ended question:** A type of survey question that requires the person completing the survey to choose from a limited number of predetermined responses (e.g., multiple choice, categorical, scale, or numerical).

**Gap analysis:** A method for designing survey questions that determines the difference between “importance” and “performance” scores for specific services (e.g., one question asks how important a service is to the resident, and another question asks how well the city performs that same service).

For more survey terms and definitions, see the SuperSurvey Knowledge Base [Online Survey Glossary](#).

The survey process may also be used to connect with residents who are interested in becoming more active in community affairs. Older residents offer rich experience and skills honed over a lifetime—these assets can be invaluable to a community and should be put to good use.

#### **Survey topics to consider**

- **Demographics**
  - Age
  - Gender
  - Ethnic or cultural background
  - Employment status
  - Income
- **Housing options**
  - Type of housing
  - Homeowner or renter
  - Monthly housing expenses
  - Condition of housing
  - Housing repair or modification needs
- **Mobility and transportation**
  - Usual mode of transportation
  - Use of public transportation
  - Use of other types of transportation
  - Use of assistive devices
  - Mobility limitations
- **Planning issues**
  - Mixed land use
  - Zoning
- **Livable community considerations**
  - Involvement in civic affairs
  - Interest in volunteer opportunities
  - Performing arts and recreation
  - Neighborhood safety
  - Satisfaction with existing neighborhood as a place to live
  - Access to health care services
- **Social engagement**
  - Participation in clubs or other recreational activities
  - Contact with family, friends, and neighbors
- **Health/social services**
  - Frequency of seeking medical care
  - History of falls
  - Use of medications
  - History of emergency room visits
  - Access to and use of various community-based social services

- **Resident characteristics**
  - Plans regarding future residency in the city
  - Level of formal education
  - Language preference
  - Residence location or neighborhood
  - Length of residency in the community
  - Living arrangements
  - Proximity to adult children or other relatives

**What types of questions should you ask, and how do you develop them?** The purpose of your survey drives the types of questions that should be included in it. Make sure questions match your research interests. Developing survey questions that elicit useful, valid data can be complicated. You may need to word questions in specific ways, and provide appropriate response mechanisms (for example, in one instance, it might be best if respondents provided their answers on a continuum from “I strongly agree” to “I strongly disagree,” while in another instance, “yes/no” may be best). You may need to ask the same question more than once, but phrased in different ways, to make sure you’re getting at a respondent’s real feelings about an issue. Be sure your questions ask respondents to consider what they will want and need in the future rather than what they want and need now.

For example, the questions below both yield information about how respondents use various modes of mobility/transportation. The first question asks about what they do now, and the second question asks them to project their needs into the future.

- How often do you currently use the following modes of transportation to get around the city?
- In 10 – 15 years, how often do you think you would use the following modes of mobility/transportation to get around the city, if available?

Answers to both questions would include a list of possible options for respondents to choose from, such as “personal vehicle,” “walking,” “bus,” and “light rail.” Respondents would be asked to choose as many options as apply to their particular situation.

The Center for Civic Partnerships supported multiple pilot tests of a resident survey, and then consulted with experts from Scantron to develop a set of questions that will result in consistent survey responses and valid data. For more information on the resident survey question set, please contact the Center at (916) 646-8680 or [ccp@civicpartnerships.org](mailto:ccp@civicpartnerships.org). You may also wish to consider retaining a consultant or company with experience designing and delivering successful surveys.

## SURVEY SERVICES & EXPERTISE

Private companies offer an array of survey services, including all aspects of survey administration, collection, and analysis.

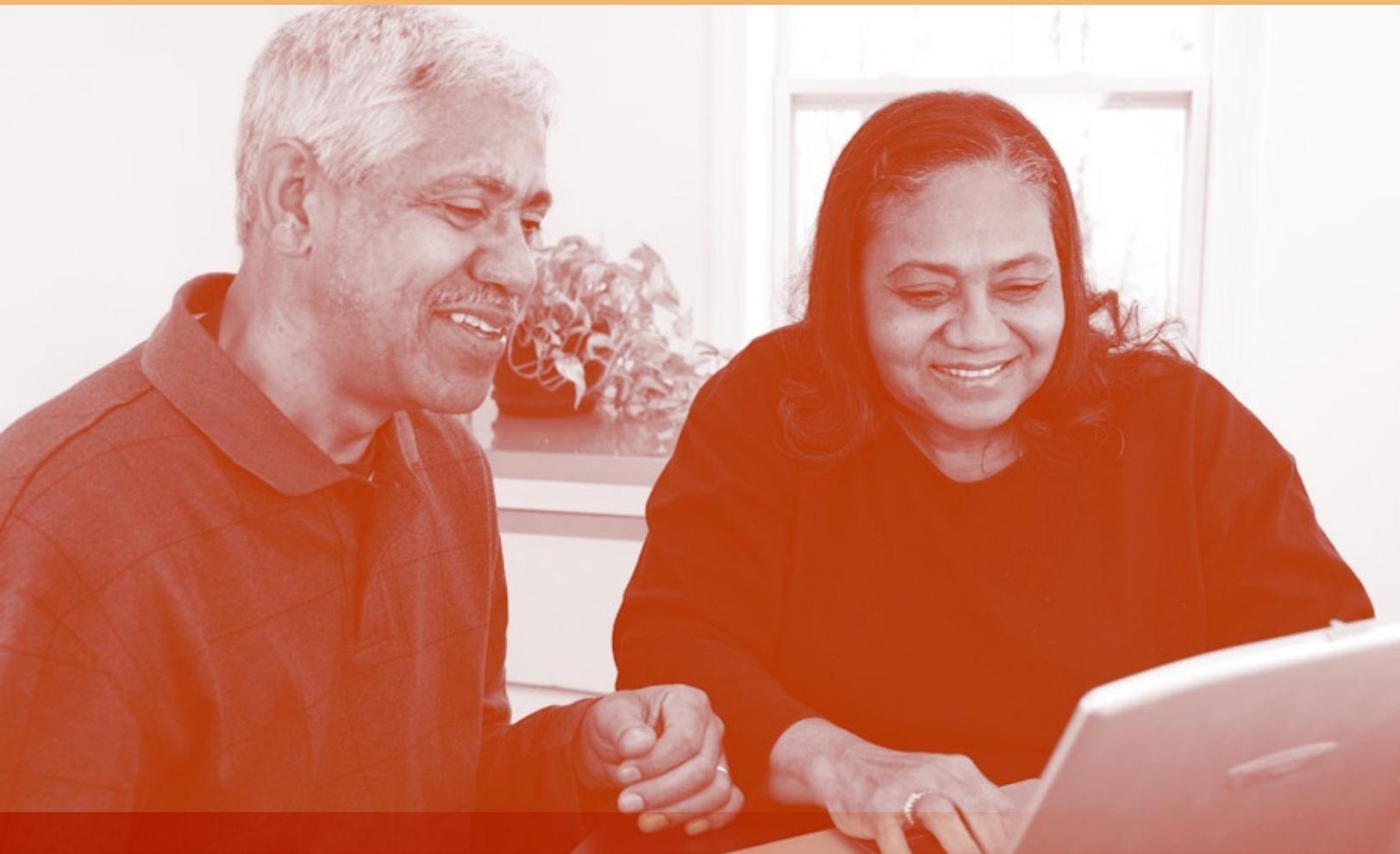
- The [National Citizen Survey](#), created by the National Research Center and the International City/County Management Association (ICMA), is a uniform tool that helps local governments assess whether residents are satisfied with services and amenities.
- [Qualtrics.com](#) offers a “Research Suite” that supports survey design, distribution, panel management, reporting, and analysis, plus advanced survey design and advanced data management.
- [Scantron.com](#) provides scannable paper surveys, web surveys, auto-host web surveys, email surveys, and responder surveys administered on wireless handheld devices.
- Web-based survey applications, such as [SurveyMonkey](#) and [Zoomerang](#), provide easy-to-use methods for conducting resident surveys online.

### “WHO ARE THE ‘RESEARCH’ COMPANIES?”

More than 2,000 research companies operate in the United States today. There is usually at least one company in every major town or city. Most companies are fairly small. They generally fall into one of two categories:

- Data collection or “interviewing services.” Their principal job is to interview people.
- “Full-service” research companies. They design the questionnaire to be used, tabulate the answers, analyze what the tabulations mean, and report results to the study sponsor. Some full-service research companies also do interviewing, but many engage the services of data collection companies for some of their projects. Colleges and universities frequently design and conduct surveys for various groups.

—Source: [Surveys and You](#)



A survey cannot predict the future, but it can provide a baseline of community-level feedback that serves as a key guidepost for future policy and planning efforts.

### **Conducting a Resident Survey**

A structured and systematic surveying process yields more valid data and more reliable results. It's important to survey as many people as possible—larger sample sizes are more likely to produce results representative of the overall population and result in less error.

Resident surveys are usually conducted using one of the following methods:

- Web-based form
- Written hard-copy document (“paper”)
- Face-to-face interview
- Telephone interview

Each method has strengths and weaknesses. If you need help deciding which method is best for your purposes, you may wish to engage an experienced survey consultant or company.

### **Web-based form**

#### • **Strengths**

- Relatively inexpensive to administer
- Easy to edit and revise to accommodate information needs
- Easier to sort through data and analyze results
- Higher response rates; faster response time

#### • **Weaknesses**

- Limited to Internet users
- Easy to ignore or delete from email box
- Difficult to guarantee confidentiality
- Survey participants may require additional orientation or instructions
- Incompatible computer platforms may cause problems

## Paper

- **Strengths**
  - Confidential
  - Inexpensive, due to self-administration
  - Standardized
  - Low interviewer bias
- **Weaknesses**
  - Greater expense related to printing and postage
  - Easy to ignore as part of junk mail
  - Cannot observe attitudinal behavior

## Face-to-face and telephone interviews (oral surveys)

- **Strengths**
  - Ability to provide more information to respondent if needed
  - More control over the response rate (e.g., interview until desired sample number is reached)
  - Personal contact
  - Flexibility to react to participant's individual situation
  - Ability to probe for more information
  - Can observe attitudinal behavior
- **Weaknesses**
  - Costly to administer (e.g., payroll costs, interviewer training)
  - Time intensive
  - Greater possibility for interviewer bias

To provide greater access to the survey, you may want to use more than one method. For example, you may decide to conduct both a paper survey and an online survey posted on your city's web site. The paper survey (distributed by mail) can promote the availability of the online version for those who have access to the Internet and are more comfortable using a web-based tool.

Use culturally competent strategies to develop your survey. Include members of all your community's diverse groups (racial, ethnic, cultural, linguistic, socioeconomic, etc.) in your survey development process. That way, members of these groups will be able to participate in your aging well planning process. (For more, see "Developing Cultural Competence—More than Just Translation" in "Community Planning for Aging Well: An Overview.")

Mailing lists that provide addresses for specific target populations are available for purchase. For example, if a local government decides to conduct a paper survey among all residents ages 45 – 64, it could purchase a list with the names and addresses of those residents from a marketing company.

A cover letter from the mayor or city/county manager should accompany the survey. The cover letter should describe local government's interest in planning ahead for a healthier community for older residents, briefly describe the process, and thank residents in advance for completing the survey. Like the survey, the cover letter should be translated according to the language needs of the community. If you are conducting a telephone survey, send a similar letter in advance, and include the date(s) and time(s) when the survey will be conducted.

You may want to include the frequently asked questions (FAQs) below in your cover letter. You can also use these questions to inform city staff and the community at large about the purpose of the survey (for example, the FAQs could be part of a public service announcement or brief newsletter update).

## Aging Well Resident Survey Frequently Asked Questions (FAQs)

- 1. What is the survey about?** It measures what residents think they might want or need in the next 10 to 15 years, in order to "age in place."
- 2. Why is this survey important?** The survey will provide critical information for local government officials to use as part of city planning and community development efforts.
- 3. What types of questions does this survey ask?** The survey asks questions about your opinions on transportation, housing, and local government planning. For example, the survey might ask a question like, "How often do you ride the bus?" or "Do you plan to live in your current home when you retire?"

- 4. How do I answer the questions?** Survey questions are easy to answer—there will be yes/no questions, multiple-choice questions, and questions with rating scales. We are interested in your honest thoughts and opinions. There are no right or wrong answers.
- 5. How long does it take to complete the survey?** You should be able to complete the survey in 20 minutes.

#### **After the Survey**

Once participants have returned their surveys, it's time to organize and analyze data, and identify key findings. We recommend retaining a company to provide these services. This will take the burden off local government staff or community volunteers. Next, collate survey results into a report. Share the report with the planning committee, local government officials, and the community. (See “Community Planning for Aging Well: An Overview” for a complete discussion on when and how to report results to the community.)

Survey results can build on the momentum your aging well planning effort has generated, or even create momentum if you're at the beginning of the process. To keep the community energized and engaged in your process, provide updates as the planning committee and local government make decisions using information from the survey, and as they complete action steps and accomplish goals.

Keep in mind that surveying residents is only one element in a continual process of creating more livable neighborhoods for aging community members. Ideally, local governments will combine the survey with a public forum and/or focus groups so that residents can share their unique opinions and ideas in the appropriate settings. Together, these activities will inform thoughtful and productive community-based planning for aging well that continues on into the future.

#### **USING THE SURVEY AS A STARTING POINT FOR PLANNING**

The City of Selma, located in Fresno County, California, conducted a “Future Needs Assessment” before organizing focus groups among residents. Survey responses gave city leadership a priority list of issues and topics of interest to aging residents. This list helped frame discussions during the community focus groups. In turn, survey participants and other members of the community saw tangible evidence that the city not only heard survey responses, but was also using them to inform the focus groups. This helped engage the community in both the focus groups and the overall planning process.

## RESOURCES

### AdvantAge Initiative Survey

#### **Center for Home Care and Policy Research**

The AdvantAge Initiative promotes a “strategy of using consumer-derived data to inform community planning and action” for the older population (ages 65 and older). This survey was specifically designed to learn about this population’s “experiences in and perceptions of their communities.” (Available at <http://www.vnsny.org/advantage/survey.html>.)

### Blueprint for Action: Developing a Livable Community for All Ages

#### **National Association of Area Agencies on Aging (n4a)**

The percentage of the population ages 65 and over will grow dramatically in the next 25 years, requiring significant adjustments from every community and age group. This guide provides community leaders with the tools necessary “to create livable communities for people of all ages” while accommodating these changes. In addition to presenting relevant community experience in solving challenges related to aging, the guide offers tools, resources, and best practices, plus a topic-specific list of studies, articles, and leading organizations. (Available at <http://n4a.org/pdf/07-116-N4A-Blueprint4ActionWCCovers.pdf>.)

### Conducting Surveys

#### **Colorado State University, Fort Collins, Campus Writing Center**

This resource provides guidelines on how to conduct a research survey, from survey basics and defining the survey’s purpose to advice on what kinds of questions to ask and how to analyze and summarize the results. (Available at <http://writing.colostate.edu/guides/researchsources/fieldresearch/surveys.cfm>.)

### Guide to Elder-friendly Community Building

#### **Cuyahoga County Planning Commission & the Cleveland Foundation**

This guide is “intended to provide a framework for collaboration, analysis, and ultimately, consensus, about shaping a community that both values its elders at the same time that it meets the needs of all members of the community.” (Available at <http://planning.co.cuyahoga.oh.us/documents/pdf/elderfriendly.pdf>.)

### The National Citizen Survey

This survey tool was developed by the National Research Center (NRC) in partnership with the International City/County Management Association (ICMA) as a uniform means for widely diverging U.S. communities to assess the satisfaction of residents with community and government services. (Available at <http://www.n-r-c.com>.)

### Online Survey Glossary

#### **SuperSurvey**

This helpful glossary defines common terms related to surveys and questionnaires. The SuperSurvey site also offers tutorials on survey audience, survey design, and other topics. (Available at <http://knowledge-base.supersurvey.com/glossary.htm>.)

### Qualtrics.com

Qualtrics provides online survey software, support tools, and information resources for both academic and corporate research needs. (Available at <http://www.qualtrics.com>.)

### Scantron

Scantron provides a wide range of software products and services to support the research and diagnostic needs of a variety of industries, from elementary and higher education to financial and health care. (Available at <http://www.scantron.com>.)

## What Is a Survey?

### **American Statistical Association**

This booklet provides essential information about foundational concepts and elements involved in surveys. The series was written specifically for those who participate in surveys or rely on the interpretation of survey results. (Available at <http://www.whatisasurvey.info>.)

### **REFERENCES**

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### **FOR MORE INFORMATION**

This guide is part of *Aging Well in Communities: A Toolkit for Planning, Engagement & Action*. This toolkit also includes a community planning overview; guides for resident surveys and public forums; case studies; and a list of aging-related resources. For the complete toolkit, visit <http://www.civicpartnerships.org/docs/services/CHCC/aging-well.htm>.



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