
How to Run an Association Survey

November 19, 2008

■ Introduction – Ken Cardinal



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▪ About Pearl Meyer & Partners

- Compensation Consulting and Surveys
- Technical expertise in compensation, benefits, equity and other human resource practices surveys
- Office locations across the U.S.
 - Atlanta
 - Boston
 - Charlotte
 - Chicago
 - Houston
 - Los Angeles
 - New York

■ Agenda

- Introduction
- Surveys as a service
- What & How
- Basic Steps
 - Who Does The Work
 - Question Development
 - Data Collection Methodology
- Additional Considerations
- RFP Process
- Wrap-up
- Questions

▪ Surveys as a Service

- **People or organizations join associations to meet a need**
- **Examples of Common Needs:**
 - Relationships / connections within a group
 - Prestige / recognition
 - Access to information or services
 - Contribute to common good
- **Purpose:** Service, source of funds or both

What Can Be Surveyed

- **Almost anything**
 - Qualitative or quantitative
- **Focus on added value or needs of members**
 - Industry metrics
 - Best practices
 - Trends
 - Issues
 - Etc.

How to Survey

- **Leverage the existing group**
 - Determine if the “group” definition needs to expand to meet the stated need.
- **Engage your audience**
- **Offer value**

Forward Steps

1. Set an objective

- a) What to survey
- b) Who will derive value from the survey
- c) Funding
- d) Frequency: one time or repeating
- e) Output: What will the survey report look like?

2. Determine whether to DIY or hire a vendor

3. Develop your question set

4. Agree on a survey methodology

5. Collect

6. Report

Many Organizations Run Their Own Surveys

Challenges:

- **Time**
- **Expertise**
- **Confidentiality**
- **Infrastructure**

▪ Big Deal or Little Deal

- **Surveys range in dimension**
 - A single question (poll)
 - Collection of detailed information requiring sophisticated questionnaires or collection tools

A Good Rule of Thumb

- Never, ever ask for anything more than is absolutely required.

A Second (related) Really Good Rule of Thumb

- Every additional question asked reduces the likelihood of any questions being answered

■ **Biggest Challenge (*DIY or Commissioned*)**

- **Getting information**
- **Getting accurate information**
- **Getting information in time**

Survey Questions

- **Another big survey challenge**
- **Science**
- **Art**

■ Questions: Be Careful What You Ask For

How is your business performing in 2008?

▪ Questions: Be Careful What You Ask For

How is your business performing in 2008?

Imprecise

No Answer Set

▪ Questions: Be Careful What You Ask For

Do you treat exempt and non-exempt employees differently?

▪ Questions: Be Careful What You Ask For

Do you treat exempt and non-exempt employees differently?

Jargon

Geographic Issue

▪ An Example of a Good (Better) Question

- **Your projected 2009 compensation increase budget, in comparison to your 2008 actual compensation increase budget, is...**

= Much higher (+1.5% or more)

= Higher (+0.5% to +1.5%)

= About the Same (+/- 0.5%)

= Lower (-0.5% to -1.5%)

= Much lower (-1.5% or more)

Question Development

- **Careful**
- **Clear**
- **Concise**
- **Contemplates all possible responses**
- **Reliability:** *the degree to which an instrument measures the same way each time*
- **Validity:** *Are the conclusions correct*

Survey Methodology

- **Methods for Information Collection**
 - Telephone
 - Email
 - Spreadsheet
- **Information Collection and Possibly More**
 - Internet
 - » Individual / Organizational Accounts
 - » Downloading
 - » Uploading
 - » Custom Features
 - Peer Group Selection
 - 24x7 Access

■ Additional Considerations

- Legal Considerations: Safe Harbor Guidelines
 - **Relevant DOL and DOJ Antitrust case***
 - » The survey is managed by a 3rd party.
 - » The information provided is based on data more than 3 months old.
 - » There are at least 5 providers for each reported statistic.
 - » No individual firm's data represents more than 25% of a reported statistic.)

<http://www.ftc.gov/bc/healthcare/industryguide/policy/statement6.pdf>

**The above information is provided for discussion purposes. Pearl Meyer & Partners is not a law firm and in no case should the above information be considered "legal advice". Each situation is unique and every organization should seek appropriate legal counsel for their unique situation.*

▪ Basic RFP Process



- Draft detailed RFP
- Email / Fax / Mail to appropriate vendors
- Provide an opportunity for questions / answers
- Assess completed RFP's
- Award to vendor of choice

Things to Cover in an RFP

- Purpose or objective
- Participants
 - Number
 - Whether you have contact information
 - Likelihood of participation
- How participant contact will be managed
- Best guess on what expected output will look like
- Level of precision required (how critical to be “spot on”)
- Frequency (e.g. one time or annual)
- Timing
- Anything else that might impact time spent

■ What Vendors Look For

- Survey viability
 - Participation
 - Timing Expectations
 - Sources of Funding
- Are we able to provide sufficient value / \$
- Survey Fit (does this fit within our area of expertise)

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2. **Determine whether to DIY or hire a vendor**
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5. **Collect** 
6. **Report** 

Free, Initial Consultation

A Pearl Meyer & Partners expert would be pleased to discuss your potential compensation, benefits, equity, or human resources practices survey project to assist you in determining your next steps.

Appendix

Portfolio of Managed Surveys

- IT/ BP Executive Outsourcing Survey
- National Engineering & Construction Survey
- The Research & Development Survey
- Systems Integration and Outsourcing Survey
- Los Alamos National Laboratory Technician Salary Survey
- Houston Engineering & Construction Salary Survey
- Massachusetts Banking Compensation Survey
- New York Banking Compensation Survey
- Connecticut Banking Compensation Survey
- Northeast Banking Compensation Survey