Building BeHeardCVA: A Mixed-Probability, Regional Survey Panel for a University Town and its Rural Surrounds

Presented at AAPOR 2019
Toronto, Canada
May 18, 2019
Authors

Thomas M. Guterbock
TomG@virginia.edu
Center for Survey Research
University of Virginia

Kathryn F. Wood
kfm3e@virginia.edu
Center for Survey Research
University of Virginia

Kara S. Fitzgibbon
KaraF@virginia.edu
Center for Survey Research
University of Virginia

Matthew J. Starnowski
mjs5zx@virginia.edu
Center for Survey Research
University of Virginia

Shawn L. Bird
ShawnLBird@gmail.com
Center for Survey Research
University of Virginia

*Special acknowledgement and thanks to Mitch Morehart (mjm3cc@virginia.edu) for his involvement in BeHeardCVA and providing analysis and tables for this presentation.
Why Create a Regional Panel?

- Recognized six-locality planning region, used by multiple state agencies
  - CSR ran omnibus survey for 5 years, but too costly
Why Create a Regional Panel?

- Model of BeHeardPhilly
  - Explore promising new methods
- Change in University of Virginia administration
  - Renew local and regional survey activity
  - Community engagement, regional impact

Larry D. Terry II  
Executive Director  
Weldon Cooper Center for Public Service

James E. Ryan  
President  
University of Virginia
Lots to do . . .

- Five areas of effort
  - Systems and operations
  - Marketing and branding
  - Community outreach
  - Panel recruitment
  - Client development

- Three phases
  - Initial panel build (to n=800), community outreach
  - Launch promotional surveys, further recruitment
  - Full production, panel maintenance
Process Phase Chart

**Phase 1**
- **Systems/Operations**
  - Sample database tracking
  - System for reminder calling
  - Intake Survey
- **Marketing/Branding**
  - Develop public-ready website
  - Initial press release of panel
  - Order promotional display items and swag
  - Begin video deployment
- **Outreach**
  - Identify initial community organizations/stakeholders; develop calendar of community events
  - Create elevator pitch/informational materials to share/leave with community organizations
  - Build community ambassadorships
  - Develop presentation materials for community organizations
  - One-on-one meetings
- **Panel Recruitment**
  - ABS mailout recruitment (6,000) in batches
  - Reminder calling of ABS recruitment
  - Social media ad linking to website/intake survey
  - Cell phone recruitment
  - Conduct protests and panel warmer surveys
  - Assemble/train street teams
  - Targeted street recruitment
- **Client Development**
  - Develop PPT for client advertising
  - Set promotional pricing, scope, and end date
  - Package of promotional materials w/$5k report

Phase 1 complete when panel reaches 800 members

**Phase 2**
- **Systems/Operations**
  - Scoursite launch (manage tracking and distribution of surveys)
- **Marketing/Branding**
  - Circulate additional press release materials
  - Video published on website
  - Update marketing materials on website as available
- **Outreach**
  - Presentations to community organizations/public meetings
  - Attend community events
- **Panel Recruitment**
  - Set incentive structure
  - Additional ABS mailout
  - Street/in-person recruitment
  - Presentation for in-person recruitment
- **Client Development**
  - Reach out to potential clients with promotional deal ($5k)
  - Develop tiered pricing structure and corresponding reports
  - Finalize client mailing package

Phase 2 complete when panel reaches 2,500 members

**Phase 3**
- **Systems/Operations**
  - Scour suite panel member interface
  - Test surveys
- **Marketing/Branding**
  - Continue to update website
  - Publicize findings from panel surveys
- **Outreach**
  - Continued presence at public events and community meetings
- **Panel Recruitment**
  - Ongoing street recruitment
  - Replenishment as needed
- **Client Development**
  - Mail/present to local government agencies and community organizations
What’s in a name?

Marketing & branding the new panel
Branding

• Define region + panel name: Challenge of giving a name to a community that doesn’t exist
  – Online survey of initial participants (Oct. 2018)
    • What name do residents use when they refer to (where they live?)
    • What name do residents think best identifies this region?
    • Residents’ preferences for panel names
  – Focus group to discuss naming (Nov. 2018)

• Results:
  – Avoid panel names that suggest protest or conflict
  – Central Virginia is accepted regional name
  – “C’ville” does not resonate for many
    • Liberal college town vs. rural surroundings
Branding

- If *BeHeard C’ville* won’t work, what will?
- If RVA = Richmond Virginia
- ... then CVA could mean “Central Virginia” or CharlottesVille Area
- Panel name: *BeHeard CVA*
Branding

• Logo
  – Engaged local design firm (HiveGroup)
  – 5 initial logo designs
  – Narrowed to 3 possible designs
    • Internal revisions w/ designers
  – Logo focus group (Dec. 2018)
    • One design clearly favored
    • Adjustments to colors and font
Panel recruitment

Probability + non-probability = “mixed probability”
Recruitment: Probability

• **Mail**
  - Region-wide ABS sample (n=2,000) (Feb. 2019)
  - Louisa County re-contact mailing (n=300) (April 2019)
  - Region-wide ABS sample (n=2,000)
    • stratified to oversample African American and Hispanic areas (May 2019)

• **Phone**
  - Follow-up reminders to 700 ABS sample cases with known phone number (Feb. 2019)
  - Cell phone cold calls (n = 4,000)
    • SmartCell + RDD (May 2019)
Your Community
Your Voice

Let your voice be heard! Help shape public policy, community services, and more by joining BeHeardCVA.

**Questions?**
Visit: www.beheardcva.org
Email: beheardcva@virginia.edu
Call: 434-243-5232
Text: 434-566-3621

BeHeardCVA is run and operated by the University of Virginia Center for Survey Research.

**What is BeHeardCVA?**
BeHeardCVA will give a voice to residents in the Charlottesville area and Central Virginia, making public policy and community services more responsive. Residents will be panel members to occasionally participate in short surveys about topics like healthcare, education, the environment, local needs, and other issues. You will be asked questions on behalf of local governments, public agencies, non-profits, and university researchers.

**How Does it Work?**
1) Sign up
   - Visit www.beheardcva.org
   - Call 434-243-5226
2) Take Surveys
   - Receive surveys and notifications however you want: email, text, or phone.
   - Take the survey whenever it is convenient.
3) See Results & Stay Connected
   - See our website for survey results, or check out the newsletters we will be distributing to our participants.
   - Stay tuned for prizes and loyalty benefits.
   - Follow us on social media.
   - Tell your friends!

All your information and responses will be kept completely confidential.

**Who Can Join BeHeardCVA?**
Any adult who lives in the city of Charlottesville or counties of Albemarle, Fluvanna, Greene, Louisa and Nelson.

**Who Sends the Surveys?**
Surveys will always come from University of Virginia Center for Survey Research (CSR) on behalf of organizations like local government, public agencies, non-profits, and university researchers.

**How Do I Take Surveys?**
You can choose – answer online or by phone.

**What Do I Get in Exchange for Taking Surveys?**
Having your voice heard and helping to make our area a better place to live. Also, each survey has something different to offer, like a monetary incentive, a chance to win prizes, or accumulate reward points.

**Call Us At 434-243-5232**
**Visit www.beheardcva.org**
Printable Flyer
Cost and productivity for probability recruitment

Mailing to ABS sample of 2,000 households
-- with phone follow-up for 700 with known numbers:

• Yield: about 100 enrolled, 5% success rate

• Our costs (not shown at full billing rate)
  – Sample purchase & prep: $438
  – Mailing cost (printing, postage, prep, labor): $1,683
  – Phone calling: $738
  – DB Management: $213

• Total cost: $3,072, or $31 per enrollment
Recruitment: Nonprobability

- Presentations to community groups
- Inclusion in online newsletters/email blasts
- Press releases through local news organizations
  - PSA’s on local radio (starting late May 2019)
- In-person public events
Recruitment – Nonprobability

“Old Farm Day” Fluvanna, VA 5/4/19

YMCA “Healthy Kids Day” Charlottesville, VA 4/28/19

Piedmont Virginia Community College 4/16/19
How Panelists Heard of Panel

- Currently have 497 enrolled panel members

Probability recruitment (213 panelists)
Is the panel representative?

How does it compare to traditional probability methods?
Composition of Panel

• To assess representativeness of panel, consider several comparisons:
  – Full panel or probability sample only?
  – Can compare to:
    • Adjusted population figures from ACS
    • Unweighted probability samples from prior CSR surveys in the same region
      – Telephone surveys \( (n \approx 1200, \text{JACS 2013-14}) \)
      – ABS postal mail with $2 incentive \( (n \approx 1,000, \text{Health District survey 2018}) \)
Measuring representativeness

1. Subtract population percentage from sample percentage

2. Divide by population percentage

• Examples: Population 60% homeowner
  – If sample shows 80% homeowner
    • Over-representation: \( \frac{(80 - 60)}{60} = 33\% \)
  – If sample shows 40% homeowner
    • Under-representation: \( \frac{(40 - 60)}{60} = -33\% \)
Age

Note: UVA undergrads excluded from population totals
Home Ownership

BeHeard CVA Sample Comparisons for Home Ownership Status

- Full BHC Sample VS Population
- Probability BHC Sample VS Population
- Prob. BHC Sample VS ABS-Postal Completes
- Prob. BHC Sample VS RDD-Phone Completes

<table>
<thead>
<tr>
<th></th>
<th>Own</th>
<th>Rent</th>
<th>Own</th>
<th>Rent</th>
<th>Own</th>
<th>Rent</th>
<th>Own</th>
<th>Rent</th>
</tr>
</thead>
<tbody>
<tr>
<td>Own</td>
<td>27</td>
<td>52</td>
<td>28</td>
<td>55</td>
<td>3</td>
<td>15</td>
<td>3</td>
<td>5</td>
</tr>
<tr>
<td>Rent</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Race/Ethnicity

BeHeardCVA Sample Comparisons for Ethnic Groups

<table>
<thead>
<tr>
<th>Percent</th>
<th>Asian</th>
<th>Black</th>
<th>White</th>
<th>Other</th>
<th>Asian</th>
<th>Black</th>
<th>White</th>
<th>Other</th>
<th>Asian</th>
<th>Black</th>
<th>White</th>
<th>Other</th>
<th>Asian</th>
<th>Black</th>
<th>White</th>
<th>Other</th>
</tr>
</thead>
</table>

Full BHC Sample VS Population

Probability BHC Sample VS ABS-Postal Completes

Prob. BHC Sample VS RDD-Phone Completes
Household Income
Representation summary

• BeHeardCVA probability sample compares favorable to ABS and phone probability samples on
  – Gender, age and home ownership

• BHC under-represents
  – blacks and Hispanics
  – low income and low education residents

• BHC full sample does not differ greatly from BHC probability sample on demographic representativeness
Challenges

• Will the panel be representative of the region?
  – In outlying rural regions + minority communities

• Will we get clients to sustain cost of running panel?
  – Need to sort out pricing (and be mindful of scope creep)

• Will the panel have community impact?
  – Be accessible to nonprofit and community organizations
  – Fulfill promise to members for engagement
Acknowledgements

Thanks to....

• University of Virginia Office of the President for funding the initial launch and development of BeHeardCVA
• BeHeardPhilly for hosting a site visit, sharing lessons learned, and providing ongoing encouragement
• UVA’s Weldon Cooper Center for center-wide staff support for BeHeardCVA
• Jane Foy, BeHeardCVA’s Community Outreach Liaison
• Matt Starnowski and Mitch Morehart for tech help
Building BeHeardCVA: A Mixed-Probability, Regional Survey Panel for a University Town and its Rural Surrounds
Timeline of Recruitment & Outreach

- Panel included in strategic plan: Nov. 2017
- First recruitment via flyer: June 2018
- BeHeardPhilly site visit: Aug. 2018
- Startup funding from Office of UVA President: Sept. 2018
- IRB protocol approved: Oct. 2018
- Naming/branding focus groups + enroll summer recruits: Nov./Dec. 2018
- ABS mailout recruitment w/ phone followup: Feb. 2019
- IRB protocol approved: March 2019
- Press release + website: April 2019
- Region-specific mailout recruitment; revise mailer; recruit street team: May 2019
- Cell phone recruitment; in-person events; ABS mailout: May 2019
Gender

BeHeardCVA Sample Comparisons for Gender

<table>
<thead>
<tr>
<th>Category</th>
<th>Female</th>
<th>Male</th>
<th>Female</th>
<th>Male</th>
<th>Female</th>
<th>Male</th>
</tr>
</thead>
<tbody>
<tr>
<td>Full BHC Sample VS Population</td>
<td>19</td>
<td>-21</td>
<td>15</td>
<td>-17</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Probability BHC Sample VS Population</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Prob. BHC Sample VS ABS-Postal Completes</td>
<td>2</td>
<td>3</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Prob. BHC Sample VS RDD-Phone Completes</td>
<td>0</td>
<td>2</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
## Locality

### BeHeardCVA Sample Comparisons for Location

<table>
<thead>
<tr>
<th>Locality</th>
<th>Full BHC Sample VS Population</th>
<th>Probability BHC Sample VS Population</th>
<th>Prob. BHC Sample VS ABS-Postal Completes</th>
<th>Prob. BHC Sample VS RDD-Phone Completes</th>
</tr>
</thead>
<tbody>
<tr>
<td>Albemarle</td>
<td>77</td>
<td>43</td>
<td>-36</td>
<td>-54</td>
</tr>
<tr>
<td>Charloitsville</td>
<td>12</td>
<td>8</td>
<td>9</td>
<td>5</td>
</tr>
<tr>
<td>Fly wanna</td>
<td>-31</td>
<td>-43</td>
<td>-24</td>
<td>-37</td>
</tr>
<tr>
<td>Greens</td>
<td>-49</td>
<td>-54</td>
<td>-38</td>
<td>-54</td>
</tr>
<tr>
<td>Lousiana</td>
<td>-49</td>
<td>-54</td>
<td>-38</td>
<td>-54</td>
</tr>
<tr>
<td>Nelson</td>
<td>-49</td>
<td>-54</td>
<td>-38</td>
<td>-54</td>
</tr>
</tbody>
</table>

**Percent**

**Note:** The data represents the percentage difference from the population, with negative values indicating underrepresentation and positive values indicating overrepresentation.
# Education

## BeHeardCVA Sample Comparisons for Education

<table>
<thead>
<tr>
<th></th>
<th>Full BHC Sample VS Population</th>
<th>Probability BHC Sample VS ABS-Postal Completes</th>
<th>Prob. BHC Sample VS RDD-Phone Completes</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>181</td>
<td>171</td>
<td>78</td>
</tr>
<tr>
<td></td>
<td>6</td>
<td>4</td>
<td>-16</td>
</tr>
<tr>
<td></td>
<td>-96</td>
<td>-96</td>
<td>-89</td>
</tr>
<tr>
<td></td>
<td>-84</td>
<td>-75</td>
<td>-62</td>
</tr>
<tr>
<td></td>
<td>-32</td>
<td>-35</td>
<td>-36</td>
</tr>
<tr>
<td></td>
<td>-14</td>
<td>4</td>
<td>-2</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

## Analysis

The chart above illustrates the comparisons between the BeHeardCVA sample and various population groups in terms of educational attainment, including:

- Full BHC Sample VS Population
- Probability BHC Sample VS ABS-Postal Completes
- Probability BHC Sample VS RDD-Phone Completes

The data shows the percentage changes across different educational levels, such as less than high school (HS), high school grad (Grad), some college, 2-year degree, 4-year degree, and graduate degree. The changes are indicated by the bars, with positive values representing an increase and negative values indicating a decrease compared to the baseline population group.