

Implementing Incentives: Client Management

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Overview

- Client variability
- Our role
- Client challenges
- Best practice strategies



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Client Variability

Clients come to survey staff with a wide range of:

- **Experience**
 - With survey research
 - With incentives
- **Institutional contexts, with different constraints**
 - Universities
 - Not-for-profit organizations
 - Government organizations



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Client Variability

- **Budgetary variability**
 - Small vs. large budget studies
 - Availability of discretionary money
 - Extent of pre-planning for incentives
- **Response rate requirements**
 - To maintain funding
 - To meet publication standards

Client Variability

- **Expectations**
 - About the survey organization's role
 - Extent to which they have already developed a plan or are looking for a recommendation
 - About our predictive abilities

The Survey Organization's Role

- Address incentives *early on* in the survey development process
 - Doing so gives clients time to work with IRB, granting agencies
 - Adding incentives mid-field can introduce complexities, incentivize negative respondent behavior

The Survey Organization's Role

- Provide clients with incentive literature to help inform decisions
- Make best practice recommendations given specifics of the project
- Anticipate questions that may be raised by the IRB



Client Challenges

- Clients aren't always aware of the total cost associated with incentives
 - Administrative/staff costs, additional mailing costs, printing/processing costs
- Response rate variability makes predicting costs challenging, particularly with:
 - Large sample sizes
 - Tight budgets
 - Substantial incentives

Client Challenges

- When incentives are unplanned, implementation can mean cuts or modifications to design
 - Instrument length
 - Complexity
 - Sample size
- Clients may come to you with a less-than-optimal incentive plan
 - “Can’t we just do a lottery?”

Client Challenges

- Incentives don't guarantee a high response rate
 - Potential for client frustration
- Incentive guidelines are not universally applicable
 - What works on one study may not on another
 - Many variables impact effectiveness, such as:
 - Topic salience
 - Population attributes
 - Length
 - Mode
 - Some guesswork is always involved



Client Challenges: Experiments

- We often look for opportunities to experiment to add to the body of knowledge on incentives.
- Some considerations regarding clients:
 - Clients may not be willing to administer differential treatments to their survey populations
 - Experiments typically add design and administrative costs to be negotiated
 - Permission must be obtained to report on results
 - Clients may want to collaborate on presentations or papers summarizing results

Best Practice Strategies



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Best Practice Strategies



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Best Practice Strategies

- Recognize differences in client goals, backgrounds, and needs.
- Tailor advice to client level of experience.
- Discuss incentive strategies with clients early on.
- Stay current on literature and be prepared to make best-practice recommendations across a variety of scenarios
- Be flexible.
- Work closely with your administrative office to track costs as changes to incentives take place on the project.



Thank You!

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