Implementing Incentives: Client Management

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Overview

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