

Engage Module

Polco empowers local governments and other public sector organizations with the data they need to make informed decisions with confidence. The Engage Module, along with the Track and Assess Modules, comprise Polco's online civic engagement platform. Polco provides local government leaders with the best in survey research alongside cutting-edge online civic engagement capabilities.

The information below contains information on Polco's proprietary survey methods and should not be shared without Polco's express written permission.

What is the difference between a probability and non-probability (open participation) survey?

An open participation survey is offered to all residents in a community. This method is important because it provides engagement opportunities to all, thus often providing a higher number of completed responses overall and for population sub-groups. It can be less resource intensive and require less time from administration to actionable data. Open participation surveys also can benefit from snowball sampling whereby existing survey respondents can recruit their friends and acquaintances and response grows like a rolling snowball. This sampling method can be used to elevate general awareness of the research effort and increase overall response and the response from those who do not traditionally participate in surveys. On the other hand, a probability-based survey uses a sampling method where every eligible person or household in a community has a known chance of being selected to participate. Respondents are selected at random from a comprehensive list (usually of residential addresses) as an effort to reduce bias. Probability-based sampling is considered the gold standard for survey methods, although with declining response rates and the advent of new outreach and weighting methods -- this status may change in the near future. Those who need quick input, feedback where they are most interested in in-depth exploration of reasons for opinions, or crowdsourcing ideas may be best served by open participation surveys.

What kinds of surveys are in the Engage Module?

The Engage Module houses non-probability, or open participation, surveys.

What is the Polco Library?

The Polco Library allows organizations to create relevant, timely, semi-custom surveys without the hassle of starting from scratch. The team at Polco spends time every day developing good survey questions. It can be harder than it looks! If you're creating a survey you have a couple of choices — either to completely draft from scratch, or to modify from an existing survey. Survey scientists at Polco called on their 25 years of experience to create the Polco Library. The Library is a collection of expert-written, curated short surveys on common topics we've encountered in our extensive work with local governments. All of our surveys can be edited to suit your needs. Many of our surveys are available at low or no cost. The Polco Library is full of short and long surveys that cover a wide variety of research interests for public entities. Surveys have covered

topics such as COVID-19, economic development, recreation facilities, budgeting, housing, equity and inclusion and more. Each survey is designed to help you dive deeper into specific issues facing your community today. The Polco Library also has a search feature that allows you to quickly identify surveys or polls related to the issue you'd like to address. With the search feature, you can also find specific questions that you may want to use.

What are the benefits of using Polco Engage rather than another survey option?

1. Survey questions in the Polco Library have been written and vetted by survey research experts
2. You can be confident that you're hearing from people who are actually your residents through our verification methods
3. Our team is comprised of experts in both local government and survey science
4. Our entire survey library, question types, and reporting are fully customized for local government

What is the estimated time that it takes people to complete a survey?

You can conduct shorter surveys of any length online with Polco's Engage Module.

What is Polco's relationship with Balancing Act? Can I use Balancing Act simulations in Engage?

Balancing Act joined Polco in early 2023. Balancing Act Budget and Housing Simulations, as well as Taxpayer Receipt and Prioritize, are available to residents of cities using both Polco and Balancing Act through Polco's resident feed. We will continue to add Balancing Act functionality to Polco, which local governments can use to get input from residents on a variety of topics. Both Engage and Assess will house Balancing Act functionality; Engage will include non-probability simulations, while Assess will include probability simulations that include a representative sample of residents.

Survey Methodology

Which sampling methods do you use and why?

We use both probability-based random sampling and non-probability recruitment sampling methods. Both methods have strengths and we believe the short-run future is best served by combinations of these methodologies. Probability-based random sampling has been the gold standard for decades, and consequently a lot of correction and calibration methodologies have emerged to enhance this methodology even though general response rates have declined. Non-probability recruitment sampling (sometimes also referred to as "open participation") can generate an order of magnitude larger sample sizes very quickly and easily, but can also suffer larger non-response sample selection biases that to date haven't enjoyed the same correction calibrations that non-response bias corrections in probability-based sampling have. However, this is starting to change quickly. We believe that a decade from now, if not sooner, open participation will be the dominant sampling methodology. In the meantime, smart combinations should be considered depending on the jurisdiction, demographics, and nature of the survey or poll. Another benefit of non-probability recruitment (open participation) sampling is that it also

gives the opportunity for every constituent of the community to share their voice, not just the selected few. To date, Polco has conducted over 300 (and more every day) community surveys with both methodologies employed in parallel, giving Polco's survey and data scientists a unique advantage in understanding the value and best ways to combine these methodologies, each of which bring critical strengths with them. If you'd like to conduct a probability-based survey, you can do this with Polco's Assess Module.

How do I know the survey is secure?

Results are never reported in a way that an individual's identity can be known through their responses.

What stops respondents from taking the survey multiple times?

We have conducted extensive testing over the past two decades on duplicate responses (and have also presented on this topic at AAPOR). In our research, we have found duplicate responses and submissions to be quite rare; in fact, it is a long-standing joke in the survey industry that it is difficult enough to get the respondent to take the survey once, much less multiple times. We do check for duplicate responses during our analysis and remove those from the dataset when found. If duplicate responses are a big concern for the City, you could consider requiring registration on the survey. This is an online survey setting that requires respondents to provide their email address and zip code in order to submit a response. We generally recommend allowing guest responses for the random sample survey, to reduce any potential barriers for residents; requiring registration is one way to deter multiple responses from a single individual, but it might also deter response in general, so it's worth additional consideration and discussion.

What does it mean if a respondent is verified?

Respondents will be asked to provide their name, zip code, and email address. The name and zip code can be verified against voter registration records, giving Polco admins additional demographic information such as gender, age range, and voting district. Polco uses the respondent's input (name and zip code) and a proprietary matching algorithm to find that individual within a local verification list (usually the voter registration database for the City). Historically, Polco has matched around 60% to 70% of its responding users on local voter files. Each user successfully matched against the verification list no longer needs to self-report most additional demographic and geographic information (age, gender, precinct/ward, etc.). This not only improves the accuracy of the results, but helps stave off survey fatigue. In addition, verification ensures that respondents only respond to each survey once, avoiding fraud and ballot box stuffing. By comparing verified results to unverified results, admins can get a better idea of the accuracy of their results and identify any potential issues. Polco values respondent privacy and does not report any individually identifying information.

Residents are concerned about needing to provide their email addresses to submit the survey (if registration is required). They're saying it's not anonymous/confidential. How should I respond?

Polco's privacy policy is very strict and favors respondents. We never share email addresses, for any reason, ever. Polco will also not share email addresses with our customers, so the City will not have access to the list of residents' email addresses. Email addresses are kept separate from the survey responses, and are not tied to any data that we provide the City. By requiring residents to include their zip code and email address when they submit the survey, we make sure to hear from a single resident only once and ensure that people are not responding multiple times. Any residents that have registered with Polco will receive an email notification whenever the City posts additional content on Polco in the future, allowing them the chance to respond/engage with the City if they wish, and they can opt out at any time. Polco will never share residents' email addresses or reach out for any other reason outside of civic engagement!

What type of response rate can I expect?

Typically we see a response rate of 15-25% from communities. In general, response rates to surveys have lowered over time across the entire survey research industry. We continue to explore different methods for encouraging engagement!

What can we try to increase our response rates?

- More publicity – Polco is happy to provide outreach templates if needed. Share news about the survey via as many channels and outreach methods as possible.
- Change the survey to be more user-friendly – decrease respondent burden by making it shorter or less dense.
- Add additional survey invitation contacts, such as a reminder postcard.
- Make sure you choose a convenient time of year (e.g., avoid the holidays).
- Share how the results will be used. Residents are more likely to respond if they know their responses will be valued and will make a real difference!
- Create a regular cadence of engaging with residents over time. Help residents become familiar with outreach efforts from the City, and see that it leads to action and change.

Data Analysis and Validity

How do you conduct your data analysis?

We conduct most of our data analysis in R, Python, and SPSS. Our data analysis approaches include a wide array of analytic techniques: simple descriptive data analyses such as frequency distributions, measures of central tendency and cross-tabulations; inferential tests such as ANOVA and chi-square; more sophisticated analyses such as hierarchical linear modeling or modeling with multiple linear regression or logistic regression, time series analysis, and multi-factorial analysis of variance; as well as structural tests using factor analysis or cluster analysis.

How many responses do I need for my results to be valid?

The number of surveys received will impact the margin of error. We typically strive for a margin of error of +/-5%.

What is auto-weighting and what methods do you use to auto-weight open participation survey results?

Weighting is a method used to make the demographics of respondents match the demographics of the total population of your community. After we get the results back, we compare certain variables like age, race and gender, between the sample and the entire population using Census data. Those who respond to the survey are not always representative of the total population. There are some groups that are commonly underrepresented, such as males and renters. Weighting allows us to adjust the results to bring them more in line with the population norms. For example, if our sample of survey respondents contained 40% males and the population contained 49% males, weighting can be used to adjust the data to correct for this discrepancy. This allows us to give underrepresented groups a voice and align the sample with the entire population of your community. We use a statistical weighting technique called raking to ensure the demographic characteristics of our survey respondents align with known characteristics for the population as whole. Respondent demographics are either self-reported (they responded to a demographic question on a survey) or from a third party source, such as voter registration files. If both are available, we use the self-reported demographic information. We use data from the US Census or the American Community Survey to weight the data. The goal is to make the survey's sample of respondents representative of the entire community. We run the weighting algorithm once per day while a survey is open.

Using/Sharing the Results

What can I see in my online report?

Once a survey has closed, you can click on the survey and scroll down to view the results. You'll see three tabs: Participation, Survey Results, and Advanced Results. Under Participation, you'll get an idea of the respondents to your survey, including responses over time, representativeness by gender and age, and verified responses, plus a map of respondents' locations. Under Survey Results, you'll find the results broken down by each question. This will help you understand top-level results. Under Advanced Results, you'll see gender, age, and precinct breakdowns for each question. This will help you understand your results more specifically. Sometimes it is helpful to understand how verified residents or specific demographics (age, gender, etc) felt relative to other groups. You can view verified results and breakdowns to achieve this level of understanding. For example, perhaps we expect a decision to disproportionately affect young women and want to make sure we have a strong understanding of their preferences. That's where breakdowns can help. It's often helpful to understand who responded to a given question and whether that group achieves the intended level of representation. Participation rates are available in real time, so you can understand who you are reaching, who you are not, and can adjust outreach accordingly. You can view participation rates overall from your dashboard, or view participation rates by each survey by clicking on the survey and navigating to the Participation tab. Communicating results on any topic or issue is the primary way to inform decisions and is a critical aspect of civic engagement. Both positive and negative sentiments derived from the engagement effort help shape decisions that impact the future. On Polco, you can prepare reports for communicating results to your organizational leadership, stakeholders and staff. Polco's engagement platform is designed to

provide sentiment mapping and relevant demographic information from local responders. With Polco's reporting function, you can generate a standard PDF report.

Who can see our results?

Only profile administrators can view question analytics online. Anyone who is responsible for managing the profile and posting questions and/or should have access to the analytical data should be made a profile administrator. You can also add view-only administrators who can view the question results, including all profile analytics, but can't post or edit online content.

Presenting results to your stakeholders is an important aspect of successful civic engagement. You can give individual members administrative viewing rights so they can follow results in real time and print reports as needed. You can also incorporate question results in written form or create a more in-depth analytical report for a meeting to help inform your decision-makers.

How do I filter my results?

Respondents to your surveys represent people both inside and outside your community, as well as both registered and unregistered voters. In order to see who is responding to your survey, or if you'd like to see only verified respondents or respondents within city limits, you can filter your result views. This allows you to see verified voters inside your community, those who are subscribed to your community, and all verified voters. This helps you see the subscribers within your city limits. If nearby cities are using Polco, you may notice that those people are included on the map. For example, if you wanted to do a downtown revitalization plan, you might want to know what the people in a nearby city think since you want them to spend money in your revitalized downtown. But you can always filter the verified results to see just people in your city limits. The "participants" tab for any of your surveys helps you understand your respondents. When you know who is responding to your surveys, you can target your outreach efforts in order to ensure that your survey gets to as many people as possible and a representative sample of your community. In order to protect the anonymity of respondents, you will not see the breakdowns by demographics until you have at least 10 respondents. Once you have 10 respondents, you can see respondent demographic breakdowns sorted by:

- Age & Gender: This is shown both as those who have self-reported their age/gender and for those who are verified from their voter registration record
- Ethnicity: This is shown if your respondents have self-reported their ethnicity
- Location map: This is shown for verified respondents

You may see data here even before you have asked your respondents these questions. For example, even if you didn't add a demographic question on your survey about race/ethnicity, the respondent may have answered this question on another survey. If that's the case, it will automatically populate on your Participants tab. You will see age, gender, and location for respondents who have been verified. This information comes from their voter registration file, so it will appear even if you didn't ask these questions on your survey. You can use this information to:

- Increase the number of responses in your non-probability sample
- Target your outreach efforts to different communities by primary language spoken
- Target your outreach to specific areas of your city
- Focus on outreach to certain groups by ethnicity, gender, and age

How do we know that we are only hearing from our residents, and not the residents of another jurisdiction?

In some situations, you'll want to ensure that you're hearing only from your residents. In other cases, you may want the input of those who work in your jurisdiction but don't live there (i.e. commuters), or those who regularly visit your jurisdiction (tourists, college students, people who visit businesses in your downtown, etc.). While we don't currently block non-residents from taking a survey, there are various ways on Polco to see only the results from your residents.

When local leaders want to ensure that they are hearing ONLY from residents of their jurisdiction, they'll want to use the features built into Polco to filter for these results.

There are a few ways to do this, and in this section we will walk through each one.

Registration & Voter File Verification: The default setting on Polco attempts to match respondents with public voter registration records when they include their full name and zip code. When respondents answer their first questions on Polco, they are notified that they will be asked to set up an account with their zip code and email (registration) before they are able to submit their response. Asking for the respondent's email and zip code helps you build your panel of respondents, so those people are notified of future surveys. Once they have provided their email and zip code, they are asked for voter file verification information (full name and zip code). The name and zip code are used to attempt to verify that person using voter registration records (verification), giving Polco administrators additional demographic information such as gender, age range and voting district. This also helps us know where respondents are generally located (in or outside the city boundaries). Registration further helps ensure that participants are residents of the jurisdiction (beyond providing a zip code), and that they don't vote more than once per poll (already partly mitigated by providing an email address). Polco values respondent privacy and does not report individually identifying information. Polco uses the respondent's input and a proprietary matching algorithm to find that individual within a local verification list (usually the voter registration database for the city). By comparing verified results to unverified results, admins can get a better idea of the accuracy of their results and identify any potential issues. Typically about 60-70% of respondents are verified. Registration ensures that registrants only respond to each survey once, reducing fraud and ballot box stuffing. It is rare that the same person makes the effort to register twice. Additionally, those respondents who are then verified give further confirmation of their residency. Once your results are in, you can compare verified and unverified respondents by clicking on "Results" or "Advanced Results."

Add a Self-Reported Residency Question: If you know that you only want input from residents within the boundaries of your jurisdiction on a particular survey or poll, you can make the first question on the survey a self-reported description of location. This could be a multiple choice question that says "Do you live within the boundaries of Purcellville?" "Yes/No." Use conditional logic to end the survey for respondents who answer "No." This will function as an extra check to ensure that you're hearing from respondents within your jurisdiction. Note that in larger metropolitan areas, some residents have a mailing address that is not actually within that city's jurisdiction (for example, unincorporated county areas). Those residents likely use the city's services, so their input is still valuable.

Filter by Location: Respondents to your surveys represent people both inside and outside your community, as well as both registered and unregistered voters. You may sometimes want to

know how visitors to your downtown are spending their dollars in your jurisdiction or get input from hard-to-reach populations (like undocumented individuals and people who are not registered voters), among other use cases. In order to see who is responding to your survey, or if you'd like to see only verified respondents or respondents within city limits, you can filter your result views. This allows you to see verified voters inside your community, those who are subscribed to your community, and all verified voters. This helps you see the subscribers within your city limits. On the map of respondents, you'll see that people following your city's profile will be both from within and outside the city. If nearby cities are using Polco, you may notice that those people are included on the map. For example, if you wanted to do a downtown revitalization plan, you might want to know what the people in a nearby city think since you want them to spend money in your revitalized downtown.

What are crosstabs and how do they work?

In the world of survey research, "crosstabs" are a common way of analyzing survey results. "Crosstabs" refer to the process of cross-tabulation, which is used to analyze the relationship between different variables (in survey research, the relationship between two or more survey questions). Crosstabs make your data more actionable by helping you identify patterns, trends, and correlations within your survey results. They also help you break down your results into more manageable pieces so you can focus on specific topics and demographics. Knowing how different groups of respondents answered particular questions can empower you to make data-driven decisions based on resident needs. At Polco, we sometimes use the word "crosstabs" interchangeably with "breakdowns" or "comparisons."

How have other jurisdictions shared results with their communities?

It varies by jurisdiction. Many post the report on their websites and embed or link to the results in the news section or their municipality's blog. Some give overviews in their newsletters or as utility bill enclosure, often pointing to a web URL to find the full report. Others will create press releases or have press conferences. A few jurisdictions have also packaged their results with "next steps," showing the community how they are responding to the new information. We strongly encourage you to share the results, ideally in numerous ways. This will help build trust and engagement as residents see that their responses are valued.

How have other communities used their survey results?

Other jurisdictions often use their survey results to make policy decisions and assist with strategic planning and budgeting. Communities also use the results to compare the perceptions of their jurisdictions' leadership and staff with those of their residents to see if they align. Below are a number of ways that communities use these results:

- To measure service performance
- To assess community needs
- To make strategic plans
- To demonstrate the openness of the government
- To evaluate potential policies or community characteristics
- To continue a trend line from periodic surveying
- To respond to a council mandate