SURVEY RESEARCH and EVALUATION METHODS
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WORKSHOP GOALS

By the end of the workshop, participants will be able to

- compare and contrast quantitative and qualitative methods
- describe at least two methods of evaluation
- identify at least three advantages and three disadvantages of an evaluation method
- articulate at least four factors that influence the choice of evaluation method(s)
- describe how to accommodate a respondent who has a disability

APPROACHES

**Quantitative** – respond to research questions by summarizing large amounts of data and reach generalizations based on statistical projections (e.g., questionnaires, tests)

**Qualitative** -- respond to research questions by thorough investigation of issues (e.g., observations, interviews, focus groups, key informants, diaries, journals, videotapes); identify key informants, conduct extensive interviews, edit and tell a story; intense relationship between researcher and subject – Author Studs Terkel is a master

**Mixed Methods** – a combination of quantitative and qualitative approaches

EVALUATION PLAN

Always create an evaluation plan, a document that includes, for example, indicators, data source(s), method(s) of data collection, points at which data will be collected and outcomes. This becomes your road map and reference guide during the process. Make sure that pilot testing evaluation instruments is always part of the plan.

*NOTE: Ideas presented in the following pages are meant to jump start thinking, not be all inclusive!*

FACTORS INFLUENCING CHOICE OF EVALUATION METHOD(S)

1. Why are we doing this evaluation? What do we want to know? When do we need the information? What are the desired outcomes?

2. Do we have expertise in-house to do the evaluation? Will funders accept use of in-house staff or must a contract be negotiated with an external evaluator?

3. What have colleagues in other institutions done to evaluate similar programs?
FACTORS INFLUENCING EVALUATION METHODS (cont’d)

4. What resources are available to conduct the evaluation (e.g., money, personnel, time, facilities)?

5. Are evaluation goals observable and measurable?

6. What experts should we consult during the planning process (e.g., statistician)?

7. Must respondents be guaranteed confidentiality or anonymity?

8. Who should we include in the sample? How will the sample be selected?

9. What are characteristics of the sample (e.g., literacy, cooperation, availability)?

10. Are there any geographic restrictions?

11. Will respondents need to consult records when participating in the evaluation?

12. How can social desirability be minimized?

13. Can interviewer distortion be controlled and bias prevented?

14. Can false respondents be avoided (that is, someone other than the invited respondent completing the evaluation)? Is the person on the phone really who they say they are?

15. Is there anything related to culture that should be considered when selecting methods or developing instruments?

16. When will data be collected? How will data be collected? Who will collect data?

17. What will be done with collected data? How will the data be used?

18. What instruments are needed? Do such instruments exist or must they be developed? Must the instruments be standardized?

19. How will we ensure validity and reliability of the evaluation items and instruments?

20. Who will analyze the data? At what point(s) in the process will data be analyzed?

21. How will data be analyzed? Must audiotapes be transcribed to obtain verbatim responses or may we capture the ‘essence’ of what participants think or feel? Is a database required (relational preferred)? Are statistical analyses required? If so, what tests are most meaningful (e.g., frequencies, means, cross tabs, t-tests)?
FACTORS INFLUENCING EVALUATION METHODS (cont’d)

22. How will data be displayed and disseminated (e.g., narrative, charts, tables, graphs, color, black and white, pictures, sound bytes, hard copy, CD, diskette, web)?

23. How will the information be reported? What reports must be written? For whom?

24. Have all subjects or respondents signed an informed consent form?

25. Must program materials and evaluation methods be in language(s) other than English?

26. Are program materials and evaluation methods available in alternative formats (e.g., large print, Braille, audiotape, videotape, tactile, sign language interpreter, language translator)?

27. What did the pilot test of the evaluation method(s) reveal? What needs to change?

ISSUES RELATED TO ACCESSIBILITY AND DISABILITY

When conducting survey research and evaluation, it is important to keep in mind that not everyone will speak English. Some members of the sample will have a disability. People may be, but be not limited to, color blind or have impaired physical strength, range of motion, sensory, mobility, cognition, vision, speech or hearing.

Some of the laws governing accessible practice include the following:

- Technology Related Assistance for Individuals with Disabilities Act of 1988
- the Americans with Disabilities Act of 1990
- Section 255 of the Telecommunications Act of 1996
- Section 508 of the Rehabilitation Act, as amended in 1998

The legal standards in Section 508 and Section 255 state that the following shall be accessible if “readily achievable”, that is if the entity can be made accessible without much difficulty or expense. This includes, for example, software applications and operating systems, web-based intranet and internet information, video and multimedia products, desktop and portable computers. Technical standards in Section 508 state that “Applications shall not override user selected contrast and color selections and other individual display attributes.” If applications are not accessible, then they must be, at the very least, compatible with “existing peripheral devices and specialized customer equipment commonly used by people with disabilities” (i.e., assistive technology) (Section 255). The compatibility requirement is also governed by the readily achievable standard.

There are many resources to assist with issues related to accessibility and disability, including local medical and health professionals (e.g., occupational / physical / speech therapists, rehabilitation engineers) and assistive technology specialists.
ISSUES RELATED TO ACCESSIBILITY AND DISABILITY (cont’d)

Additional information on disability and accessibility, including relevant legislation, may be found by contacting the Disability and Business Technical Assistance Center, of which there are ten located regionally throughout the United States. See the Resource List at the end of this document for contact information.

FOCUS GROUPS

A focus group combines interviewing and observation, often held as a follow-up to interviews or questionnaires. Focus groups are made up of people who have experience with the entity being evaluated. The group should be small enough (6 - 9) so that each participant has multiple opportunities to share his or her point of view. Participants can be selected from an existing list, by contacting relevant organizations, piggybacking onto an existing event, soliciting people on location (e.g., mall, park), through nominations or snowball samples and by postings on bulletin boards.

A facilitator (previously unknown to participants) asks 2 - 5 questions. A recorder (i.e., person, video and/or audiotape) records answers and relevant behaviors. Participants may (not) be given an incentive (e.g., tee shirt, free membership). Focus group sessions usually last no more than two hours. Three focus groups could be held and that number modified, as needed. When information repeats, it’s time to quit and write the report!

Nickelodeon Cable TV Network conducted focus groups to learn what pre-teens wanted to watch on television. A botanical garden conducted focus groups to identify what was (and was not) working in the docent program. A municipality used focus groups to identify the best technology to use for a narrated audio tour on architecture.

Focus Group: Advantages

- probe and clarify (e.g., following use of interviews and/or questionnaires) and therefore assist with interpretation of quantitative findings
- useful if there is only one person to collect data
- stakeholders can hear feedback from participants firsthand
- respondents can be assembled in one location
- respondents stimulate or feed off of each others’ responses
- generate ideas on a focused (i.e., limited) topic
- peer pressure challenges thinking and highlights conflicting opinions

Focus Group: Disadvantages

- cannot ensure confidentiality
- generate ideas on a very focused (i.e., limited) topic
- can stimulate ‘group think’; choose participants and questions wisely
- incur costly transcription time if use audiotape or videotape recording of group
- audio-taping or videotaping can influence group responses
- incentives given to respondents can bias responses
INTERVIEWS

An interview is not dependent on someone’s reading skill; it is dependent, however, on the skill of the individual conducting the interviews. Questions of interest are prepared and may be asked in several ways…

Structured Interview

1. same questions are asked of each respondent
2. questions asked in same order with each respondent
3. responses recorded in the same way for each respondent
4. best for inexperienced interviewers, don’t need to know a lot about study
5. good inter-rater reliability with interviewer training
6. data easily organized

Unstructured Interview

1. interviewer can reword or reorder questions or come up with additional questions
2. interviewer puts respondents at ease, allows them to go with the flow
3. interviewer helpful in directing conversation when exploring sensitive issues
4. interviewer can redirect respondent
5. questions might differ by respondent, depending on responses
6. each interviewer must know about the study purpose and process
7. produces lots of data; takes time to reduce and organize data

In-person Interview

1. open-ended questions are likely to be answered
2. process conducted over longer period of time than telephone interviews
3. expensive due to travel of both interviewer and / or respondent
4. environment where interview takes place / clothing of interviewer influence outcome
5. interviewers must be trained
6. Interviewers might not go into high crime areas / high density people areas
7. responses can go unrecorded unless tape recorded, which takes time to transcribe

Telephone Interview

1. takes less time than in-person interviews; fewer interviewers required than in-person
2. no lodging, transportation and travel costs
3. good inter-interviewer reliability if all interviewers received training and apply it
4. clothing not a concern
5. sampling considerations
   - limited to those with phones; may need special equipment for hearing impaired
   - easier to reach those in unsafe areas or low density, rural housing
   - people annoyed by telemarketers; low response rates
6. Respondents retain some anonymity, based on how phone numbers are generated
INTERVIEWS (cont’d)

**Overall Interview: Advantages**
- usually yields rich data, details and new insights
- can permit face-to-face contact with respondents
- interviewer can explain or clarify questions
- interviewer can probe or clarify responses
- interviewer can be flexible in administering interview
- may be an alternative way to get information from someone who is blind or visually impaired, who may have problems completing a questionnaire

**Overall Interview: Disadvantages**
- some in sample will not have a phone
- some in sample will not have a publicly listed phone number
- calls tend to be short or time limited due to attention of respondent
- can be expensive and time consuming
- need highly trained interviewers
- respondent may distort information through recall error, selective perceptions and desire to please interviewer
- flexibility results in inconsistent interviews
- generates large volume of information; need to transcribe and reduce
- may not be appropriate for someone who is deaf or hard of hearing

PORTFOLIOS

A portfolio is “a portable case for holding loose sheets of paper, drawings, maps, and the like” (The American Heritage Dictionary of the English Language). You might keep a portfolio of CDs you listen to over the years (with dates on them). Adults might create a portfolio of projects that highlight work for use in job interviews. Program participants might keep a portfolio of activities and projects related to the program. Portfolios might include photographs of activities; hand drawn images, original lyrics, music, games, DVDs, films, poems, reports, ideas, etc. A portfolio can showcase knowledge and skill acquisition. Portfolios may be combined with other survey research methods.

**Portfolio: Advantages**
- provides interesting cross section of work related to content
- may see personal growth or learning, when compiled over time
- individualized interpretation of content learned or skills acquired
- can compile over the years or remain project or age specific
- creative way to excite funders and demonstrate outcomes

**Portfolio: Disadvantages**
- may be labor intensive and time consuming, depending on how structured
CASE STUDIES

The case study method can provide a rich, descriptive wealth of information in a focused way, on one or several individuals. It is, therefore, difficult to generalize results from such a small sample, which may or may not be important. Researchers identify key informants, conduct extensive interviews with them and edit the interviews to tell a story. The researcher or evaluator may develop several case studies to highlight various reactions to the program or subject under evaluation. Additional data may be collected using observations or interviews over time, document reviews, journals and portfolios.

There are several different types of case studies, including the illustrative case study, the cumulative case study and the critical instance case study. Illustrative case studies describe a situation and provide readers with a common language about the content in question. Cumulative case studies gather information from several places and people, collected at different times. This may allow for generalization of conclusions. Critical instance case studies take information from more than one site or from a person or situation of unique interest. This case study is useful for addressing cause and effect questions (http://writing.colostate.edu/guides/research/casestudies).

Or, the evaluator might create case studies that highlight content under evaluation, asking respondents to read the case and respond to questions based on the case. Respondents may identify problems or issues or come away with a heightened awareness of a key concept learned from the case. Respondents can be encouraged to work their own issues out based on the case study, providing a window into their perceptions, knowledge and attitudes. Case studies can be used with individuals or with groups.

Evaluators make sense of the gathered data through coding -- sifting through data to identify patterns, trends, characteristics or actions, which then become key variables to provide meaning to the case study.

**Case studies: Advantages**

- gathers people’s reactions to real life scenarios or hypothetical scenarios
- provides opportunity for people to apply newly learned knowledge to a real life situation, as described in the case study
- integrates information from multiple sources
- produces vast amounts of data

**Case studies: Disadvantages**

- high demands with regard to evaluation design, data collection and reporting
- labor intensive to gather, analyze and interpret data from multiple sources
- produces a vast amount of data, taking time to sort through
- intense exposure to the individual(s) or the content under study can bias the evaluator and, subsequently, the findings
DOCUMENT REVIEW

Public Records
Examine public records, student transcripts, institutional mission statements, annual reports, budgets, student handbooks, textbooks, descriptions of program development and evaluation. This is a useful method to understand resources, values, processes, priorities and concerns. It is best when combined with interviews, focus groups or some other more qualitative approach to data gathering.

Personal Documents
Obtain first person accounts of events and experiences, including diaries, journals, portfolios, photographs, artwork, schedules, calendars, scrapbooks, poetry and letters to the editor. The evaluator must determine the validity and reliability of each source. Document review can be useful in generating interview questions or to identify events which, at some point, might be observed.

Document Review: Advantages
- usually available locally
- inexpensive
- grounded in setting and language in which they occur
- useful for determining value, interest, positions, political climate, public attitudes, historical trends or sequences
- provide opportunity for study of trends over time
- unobtrusive
- done at the convenience of the researcher

Document Review: Disadvantages
- review and analysis may be time consuming
- review may yield incomplete information
- documents may be inaccurate; questionable authenticity
- locating suitable documents may be too time consuming or expensive

KEY INFORMANT

A key informant is a person who has unique knowledge or skills, is knowledgeable about program participants or has general information of interest to the evaluator, resulting in rich interviews and conversations.

Key Informant: Advantages
- timely information about causes or content under study
- offers best practices or approaches from ‘inside’
- feedback may increase credibility of study
- have a pipeline to pivotal groups
- may solidify relationship between all stakeholders
KEY INFORMANT (cont’d)

Key Informant: Disadvantages

- lots of time required to identify and get commitment from individuals
- relationship between evaluator / informants influences data gathered
- informants will have biases and (mis)perceptions
- may result in disagreements among those present

PEER REVIEW

Peer review can be useful when there are multiple people doing similar things and those people might learn from the experience of others (e.g., one docent observing another conduct a tour or give a talk). Feedback is best when shared immediately following the event. Care must be taken to make the process user-friendly and not critical, even when used for the purpose of evaluation. Peer review is complemented by use of additional observations, interviews, questionnaires or portfolios.

Peer Review: Advantages

- people have opportunities to see how others do things
- can stimulate a creative exchange of information and resources
- gets people out of their habitual routines

Peer Review: Disadvantages

- participants may become guarded, fearful, resentful or defensive

OBSERVATION

Observation is offset nicely with follow-up interviews or focus groups. One may observe participants engaged in a video game, interactive exhibit, discussing a film…

Observation: Advantages

- provides direct information about behavior of individuals and groups
- permits evaluator to enter into and understand the situation and context
- provides opportunities for identifying unanticipated outcomes
- exists in natural, unstructured and flexible setting
- provides a snapshot in time of behaviors, interactions or learning

Observation: Disadvantages

- labor intensive and time consuming, thus expensive
- need qualified, highly trained observers (may need content experts)
- observer perception may distort data or observer affect participant behavior
- observer has little or no control over situation
- observed behavior(s) may be atypical at that one point in time
JOURNALS

Writing is often an effective way to process or think something through. One can write about emotions, an event, how it feels to be part of a team, something that went wrong, or career ideas. A journal can be pieces of paper in a box or in an orderly notebook. A journal might be a videotape or an audiotape of something meaningful that includes one’s reaction to it. Journal entries may be made on a regular basis or be event driven. Journal entries usually include the date, event and the reaction to the event. It is often difficult to get started, so journal prompts may be used, as in the following examples:

**Self-discovery**
- Something that challenged me today was...
- I discovered I am good at...
- Something I want to work on is...
- Something I did today that makes me proud is...

**Career Awareness**
- A job that I would be good at is _____ because _____.
- To become a _____ I should _____.
- A job that sounds interesting to me is _____ because _____.

QUESTIONNAIRES

When thinking about evaluation methods, remember that more people have an address than have a telephone number or email address. A questionnaire contains items developed using multiple formats, including multiple choice, open-ended or short answer, true / false, matrix with scaled items and closed-ended items. Questionnaires are the most often used of any survey research method and the method most often misused. Creating questionnaires is both an art and a science. Whether using paper, emailed or web-based questionnaires, careful attention must be paid to item formatting, word choice, item order, recall, item order, context effects and social desirability – all within the control of those who create the questionnaire.

The intent or purpose of the questionnaire must be clearly articulated; every item on the questionnaire must relate to the evaluation or research questions. It is tempting to throw in a few questions or items to ‘see what people think’, as long as the questionnaire is being created, but resist that temptation. Include only those items that relate directly to the purpose of the questionnaire. In fact, keep documentation noting which items relate to which research questions. This facilitates data analysis and report writing.

Questionnaires may be administered in any of the following ways, including web-based and self-administered, e-mailed and self administered, mailed and self administered and those administered in-person on an individual or group basis.

*Self-administered questionnaires* allow respondents time to think and use resources. There is, however, no opportunity to clarify or probe. Responding is limited to those who can read and write, who physically have the requisite motor skills to write or type.
QUESTIONNAIRES (cont’d)

If respondents have a disability, they may tire easily, have poor vision, may not be able to write and, therefore, be unable to complete the questionnaire. They may submit an incomplete questionnaire. Or, they may find someone to help them complete the questionnaire, in which case a collective point of view results instead of the sole view of the individual to whom the questionnaire was sent.

*Questionnaires may be administered by an evaluator* to groups of people gathered at the same location. While respondents must take time to travel to that common destination, this scenario does permit the respondent to seek clarification on items. Although fewer individuals can be reached in this way than with a mailed or online questionnaire, there is a high response rate from those who participate. This scenario differs from a focus group because each individual has a copy of the questionnaire and completes it. Each individual’s feedback to each item is gathered.

*A mailed questionnaire* takes longer to collect data than any other mode. Postage is costly and the evaluator has no control over whether questionnaires reach their destinations. Sending mailed questionnaires that require notification of receipt is even more costly. The chances of someone responding to a mailed questionnaire are better if care is taken to distinguish the mailing from junk mail, recipients have been pre-notified of the mailing and the evaluator encloses a self-addressed stamped envelope. Mailed questionnaires usually results in one of the lowest response rates of any method used in survey research.

Emailing questionnaires to respondents can minimize cost but technology can be unreliable. Emailed questionnaires can go unnoticed, since people receive a lot of email and may or may not see it. Nor might they see the emailed questionnaire if it falls into a SPAM folder.

If someone hasn’t responded by the deadline, another complete packet of information could be (e)mailed out, not just a reminder. While mailing is costly, it does increase response rate. If the respondent has more free time when s/he receives the second packet, s/he may sit down and respond, and has the information with which to do so.

It is important to develop a system to track responses received so that reminder postcards can be sent to non-respondents. Many online services have the ability to track those who have and have not completed the questionnaire as well as those who have declined to complete it. Consider a way to gather demographic information from non-respondents to determine the similarity between respondents and non-respondents on characteristics important to the evaluation.

Use of a questionnaire limits responses to those who can read or write. Consider the intent of the evaluation and the sample; be inclusive in your data collection. Offer alternative formats, when necessary.

Remember to combine use of a questionnaire with more qualitative methods such as observation, interviews and focus groups to gather rich, descriptive data.
QUESTIONNAIRES (cont’d)

Self-administered questionnaires: Advantages

- allows respondents time to think about issues before responding (important for some people with disabilities)
- allows respondents to consult with or to use resources when responding
- may increase responses to sensitive issues, since no one is present asking questions which may be embarrassing to both parties

Self-administered questionnaires: Disadvantages

- no opportunity to clarify or probe
- allows respondents to consult with or to use resources when responding
- limited to those who can read and write
- do not know whether person invited to participate is actually the one who completed the questionnaire
- if someone helps another complete the questionnaire, a collective view results instead of the view of the individual to whom questionnaire was sent
- if mailed, never know whether questionnaire reached its intended destination
- if mailed, takes longer to gather data
- if mailed, results in a poor response rate
- if mailed, postage is costly

Administered onsite by evaluator, individually or in group: Advantages

- evaluator may clarify and answer questions
- have time to think about responses
- evaluator knows that individual responding is the one evaluator invited to respond by check of some identification upon arrival
- ensures good response rate

Administered onsite by evaluator, individually or in group: Disadvantages

- respondents must travel to common location

Online questionnaires: Advantages

NOTE: dependent on options provided (or not) by vendor

- may be cost efficient, depending upon vendor and system selected
- allows people to start the questionnaire and complete at later time (not all vendors have this option)
- quick delivery / response time
- appeals to techno-savvy audiences
- perceived by many to be ‘green’, or environmentally friendly
- provides statistical results immediately
- able to track those who have both responded and declined
QUESTIONNAIRES (cont’d)

Online questionnaires: Disadvantages
NOTE: dependent upon options provided (or not) by vendor

- technology can be unreliable – yours, respondents, and survey vendors
- unsolicited emails (or too many emails) may be deleted or overlooked
- questionnaire may go into SPAM folder and never reach participant
- privacy issues are of concern
- respondent may inadvertently submit multiple times
- no one to clarify questions

Some questions to ask when considering vendors of online questionnaires

1. What is the cost based on? Be wary of those who demand payment by number of respondents, since vendors establish same protocol whether one or one thousand people respond.

2. Who sends out invitations to participants, the vendor or you? Does the invitation promote your brand (logo, tag line)? If not, what options does the application offer?

3. What level of reporting is supported by the application? Can data be exported into another application (e.g., Excel, Access, SPSS)?

4. What accommodations does the application have for people with disabilities?

5. Can respondents start, stop, save responses to that point and return another time to complete the online questionnaire?

6. How long is data kept? What restrictions, if any, do I have in accessing the data?

7. What is the loading speed of one page? (2 seconds is ok; 1 minute is not)

8. How long has the company been around? Generally, the longer the better!

9. What does the licensing fee include? Know the number of people using the application and whether they are at one site or multiple sites.
Resource List
Survey Research and Evaluation Methods

EVALUATION

The ABCs of Evaluation: Timeless Techniques for Program and Project Managers, 2nd Edition
By John Boulmetis, Phyllis Dutwin
Shows how to select participants for the evaluation and how to deal with multiple goals and objectives—including those of the organization, the staff, and the client. Authors describe different evaluation models, illustrate the circumstances under which each model can be used, and offer tips on identifying data sources and collecting the data itself; contains illustrative cases and scenarios from evaluations in social sciences, education, and human services; contains information on how to negotiate the evaluation contract.

Evaluation, A Systematic Approach, Seventh Edition
By Peter H. Rossi, Mark W. Lipsey and Howard E. Freeman
Covers the full range of evaluation topics, including framing evaluation questions, uncovering program theory, studying implementation, designing impact assessments, assessing program costs and benefits and understanding the politics of evaluation. Includes examples, a glossary of key terms and concepts, outcome measurement, lengthy discussions of program theory, including a section about detecting program effects and interpreting their practical significance; an augmented and updated discussion of major evaluation designs, alternative approaches to evaluation, examples of successful evaluations and discussions of the political and social contexts of evaluation.

Evaluation Essentials: Methods for Conducting Sound Research
By Beth Osborne Daponte
The book focuses on issues that arise when evaluating programs, using case studies from social services, health, education and social work. Readers learn to form evaluation questions, describe programs using program theory and program logic models, understand causation as it relates to evaluation, and perform quasi-experimental design, grant writing, outcome measures, survey design, and sampling.

Health Programs, Second Edition
By Arlene Fink
Emphasis on the outcomes, effectiveness, and quality of evaluations. In-depth coverage of ethics and institutional review boards, and the principles that guide them in the evaluation process.
EVALUATION (cont’d)

Measuring Program Outcomes: A Practical Approach, 16th printing
By United Way of America
Item Number 0989 / To order call 1-800-772-0008
Conversationally written to contain glossary of outcome measurement terms, assembling an outcome measurement work group, developing a timeline, defining measurable outcomes, logic models, specifying indicators, identifying data sources and methods of data collection, influencing factors, data entry and analysis, data display and use of findings.

Practical Program Evaluation Assessing and Improving Planning, Implementation, and Effectiveness
By Huey Tsyh Chen
Provides perspective on program evaluation theory; provides a practical evaluation taxonomy as a road map for evaluators to facilitate better communication with stakeholders; covers evaluation as full program cycle, including planning, initial implementation, mature implementation, and outcomes; illustrates qualitative, quantitative, and mixed methods research approaches and their impact on program evaluation.

RealWorld Evaluation: Working Under Budget, Time, Data, and Political Constraints
By Michael J. Bamberger, Jim Rugh, Linda Mabry
ISBN: 9781412909464 (February 2006)
Provides practical guidance: well documented case studies provided for addressing budget, time, and data constraints, and for dealing with political pressures. Uses a mixed-methods approach; Design, methods, cultural sensitivity, validity, credibility, and reporting are among the many topics addressed. Triangulation is encouraged for increasing the validity of findings. Frameworks and checklists are provided for assessing the strengths and weaknesses of an evaluation.

Youth Participatory Evaluation: Strategies for Engaging Young People
By Kim Sabo Flores
Provides step-by-step, playful, and accessible activities that have proven effective and can be used by evaluators, educators, youth workers, researchers, funders, and children’s and human rights advocates in their efforts to more effectively engage young people.
LOGIC MODELING

Evaluation Fundamentals Insights into the Outcomes, Effectiveness, and Quality of Logic Modeling Methods in Program Evaluation
By Joy A. Frechtling
Identifies specific components of logic modeling and discusses inputs, activities, outputs, short and long-term outcomes, contextual factors, and optional components and variations. Applies logic model to case studies of simple, multi-year and complex projects.

The Logic Model Guidebook: Better Strategies for Great Results
By Cynthia C. Phillips and Lisa Wyatt Knowlton
ISBN: 9781412958646 (September 2008)
Offers a concise, practical overview of the logic modeling process as applied to numerous organizational contexts. Examine the structures, processes, and language of logic models as an tool that improves the design, development, and implementation of change efforts within programs and greater organizational initiatives.

SURVEY RESEARCH METHODS

The Art of Asking Questions
By Stanley L. Payne
Published by the Princeton University Press, Princeton, NJ (1951)
A classic publication; last chapter contains a concise checklist of 100 things to consider when developing questions or items used in survey research or evaluation.

Computer Assisted Survey Information Collection
By Mick P. Couper (Editor), Reginald P. Baker, Jelke Bethlehem (Editor), Cynthia Z. F. Clark (Editor), Jean Martin (Editor), William L. Nicholls, II (Editor), James M. O'Reilly (Editor)
Computer assisted survey information collection (CASIC) methods are rapidly replacing traditional "paper and pencil" survey procedures. Considers emerging technologies, such as voice recognition, pen-CASIC, and the Web as a data collection tool.

By Ronald F. Czaja and Johnny Blair
Accounts for changes in telephone, Internet, and email surveying and provides a more comprehensive treatment on questionnaire testing; selection of the sample, the writing of questions to solicit an unbiased response, and the ethical treatment of human subjects. Addresses the methodology of Internet surveys, including a summary of experiences and practices to date, and how Internet surveys interface with more traditional methods.
SURVEY RESEARCH METHODS (cont’d)

Encyclopedia of Survey Research Methods
Edited by Paul J. Lavrakas
Presents comprehensive information and methodological examples from the field of survey research. With more than 600 entries, this resource considers all aspects of possible survey error from a cost-benefit standpoint. Covers all major facets of survey research methodology, from selecting the sample design and the sampling frame, designing and pretesting the questionnaire, data collection, and data coding, to the thorny issues surrounding diminishing response rates, confidentiality, privacy, informed consent and other ethical issues, data weighting and data analysis.

By Dutka, A. (1993)
This book covers the how-to of developing surveys to assess customer satisfaction. While it has a manufacturing/industry perspective, you can still learn something that can be applied to Total Quality Management in healthcare delivery as well as public health.

By Arlene Fink
Guides readers to developing their own rigorous surveys and evaluate the credibility of others. Offers a data analysis chapter to take into account the availability of statistical programs with a new section on analyzing qualitative data from open ended questions. Provides a section on internal and external validity of research designs with more information on Likert scales, cross tabs and downloading data from online surveys; gives readers links to exemplary surveys.

How to Conduct Your Own Survey
How to conduct a survey: mail, telephone or face-to-face. Will take you step by step through each type of survey, giving you the pros and cons for each method, and what kinds of errors you should watch out for.

Improving Survey Questions
By Fowler, Jr., F.J. (1995)
A systematic overview of how to improve questions used to elicit information. Includes an information sheet summarizing what the research project is all about.

Measuring Customer Satisfaction: Development and Use of Questionnaires
By Hayes, B.E. (1992)
A good book about the basics of questionnaires and how to analyze results.
SURVEY RESEARCH METHODS (cont’d)

Questionnaire Research
By Patten, M. L. (1998)
Covers all the basics, plus material like how to calculate margins of error and very easy-to-understand explanations of statistical procedures you need to know to report results.

Questionnaire Survey Research -- What Works, 2nd Edition
A hands-on manual to conducting survey research, as told from the perspective of an academic institutional researcher. Most helpful for those doing research in an academic environment.

An excellent series for the serious survey researcher. All the books written by A. Fink are excellent in simplicity and understanding.

The Survey Handbook
By Fink, Arlene
Covers what a survey as a research instrument is all about. Provides introductions to others books in this series. Good sections on how to analyze open-ended questions and how to develop a plan for conducting a survey, and what to consider in terms of costs and resources.

How to Ask Survey Questions
By Fink, Arlene
Did you know that surveys are used mainly to measure attitudes? Do you want categorical, ordinal or numerical data? How valid is your survey? How to ask questions that will get to the heart of the matter.

How to Conduct Self-Administered and Mail Surveys
By Bourque, L.B., & Fielder, E.P
Everything you need to know from developing the proper format and questions to processing, editing and coding the responses. Includes all the details surrounding the conduct of mail surveys -- personnel and cost requirements. Not as simply written as Fink’s books, but worth the time spent reading about mail surveys.

How to Conduct Interviews by Telephone and in Person
By Frey, J.H., & Oishi, S.M
A good how-to about face-to-face and telephone interviews -- from how to write interview questions to monitoring the quality of data collection, as well as developing a manual for training and conducting such sessions.
SURVEY RESEARCH METHODS (cont’d)

The Survey Kit Series (cont’d)

How to Design Surveys
By Fink, Arlene
A must-read-first text if you are planning a survey. Are you planning a descriptive or experimental survey? Are you going to describe, compare, or predict? Provides a classification of survey designs, examples and checklists throughout.

How to Sample in Surveys
By Fink, Arlene
How you pick your study sample will affect your ability to generalize. Offers simple explanations on calculating sample size, response rate, inclusion/exclusion criteria, and various methods of sampling (simple random, stratified, systematic, cluster, convenience, snowball, quota), and using focus groups.

How to Measure Survey Reliability and Validity
By Litwin, M. S
The science of psychometrics - determining the quality of a survey - is the focus of this how-to text in ensuring your survey will be excellent in every way, from coding, pilot-testing, scaling and scoring surveys to measuring reliability and validity.

How to Analyze Survey Data
By Fink, Arlene
A simple how-to text on analyzing survey data, using various types of measurement scales (nominal, ordinal, numerical), choosing an appropriate statistical method, determining relationships or correlation. Excellent explanation of how to use confidence intervals.

How to Report on Surveys
By Fink, Arlene
How to make the most of the data you've spent so hard collecting and analyzing. Shows the best way to present data in tabular and chart forms, how to make oral presentations of your results and how to say-what-mean and mean-what-you-found on paper.

Survey Methodology
By Robert M. Groves, Floyd J. Fowler, Jr., Mick P. Couper, James M. Lepkowski, Eleanor Singer, Roger Tourangeau
Written by six nationally recognized experts in the field, this book covers the major considerations in designing and conducting a survey. End-of-chapter terms, references, and exercises enhance its value as a reference for practitioners.
SURVEY RESEARCH METHODS (cont’d)

The Survey Research Handbook, 2nd Edition
Excellent explanations about how to analyze what you’ve gathered, writing up and presenting your research to those who have sponsored it. An appendix is devoted to the art of conducting a focus group as a method of exploratory data gathering before actually doing a survey.

Survey Research Methods. 2nd Edition
By Babbie, Earl (1990)
All around great text for an excellent understanding of what survey research is about -- its strengths and weaknesses, and its limitations. For more in-depth coverage on hands-on aspects of survey research, check out Alreck & Settle's The Survey Research Handbook. 2nd Edition.

Survey Research Methods
By Fowler, Jr., F.J. (1993)
Covers everything you need to know about doing this kind of research. While comprehensive in scope, other texts as Alreck and Settle, and Salant and Dillman, and The Survey Kit cover the same topics in greater depth and are probably better from a how-to perspective. Chapters 9-11 cover topics such as ethical considerations, methodological documentation and survey error are a bonus since such areas are usually covered only in passing in other texts.

Survey Research Methods, 4th edition
By Floyd J. Fowler
ISBN: 9781412958417 (September 2008)
Presents the very latest methodological knowledge on surveys for those who want to collect, analyze, or read about survey data with a sound basis for evaluating how each aspect of a survey can affect its precision, accuracy, and credibility. This edition provides updates – addressing growth of the Internet for data collection and the subsequent rapid expansion of online survey usage; the drop in response rates for telephone surveys, particularly those based on random-digit dialing; and the growing role of individual cell phone in addition -- and often instead of -- household landlines.

Edited by Susan K. Nichols
Published by American Association of Museums (1990)

What is a Survey Series (1995)
By American Statistical Association / Section on Survey Research Methods.
Each 12-page brochure provides a good overview of survey research methodology.
#1. What is a Survey… #2. How to Plan A Survey… #3. How to Collect Survey Data
QUALITATIVE RESEARCH

Designing Qualitative Research
By Uwe Flick
Providing a comprehensive guide to devising an effective research design, author discusses each stage of the process of designing qualitative research in detail, including formulating a research design, selecting an appropriate strategy, conceptual framework and data source, and collecting and analyzing data.

The Practice of Qualitative Research
By Sharlene Nagy Hesse-Biber and Patricia Lina Leavy
Covers mainstream qualitative methods and a number of more unconventional ones such as oral history, visual and unobtrusive methods, and present an overview of mixed-methods approaches. “Behind-the-Scenes” boxes provide valuable insights written by well-known qualitative researchers on problems and issues they have encountered in their research; In-depth examples carried through each chapter, so show how different approaches to a particular topic allows a researcher to ask certain questions and gain particular kinds of insights; up-to-date analysis of the range of computer software programs available.

The SAGE Handbook of Qualitative Research, Third Edition
Edited by Norman K. Denzin and Yvonna S. Lincoln
Addresses indigenous research, institutional review boards and human subject research, critical and performance ethnography, arts-based inquiry, narrative inquiry, Foucault, the ethics and strategies of on-line research, cultural and investigative poetics, and the politics of evaluation.

MIXED METHODS

Designing and Conducting Mixed Methods Research
By John W. Creswell and Vicki L. Plano Clark
Offers a practical, how-to guide for designing a mixed methods study; presents examples from actual, published mixed methods studies drawn across the social, behavioral, health, and education disciplines; incorporates activities and exercises for classroom use or for use by the researcher in preparing designs; Covers the entire research process, from
formulating questions to designing the evaluation, collecting data and interpreting information.

**MIXED METHODS (cont’d)**

*Foundations of Mixed Methods Research Integrating Quantitative and Qualitative Techniques in the Social and Behavioral Sciences*

By Charles Teddlie and Abbas Tashakkori

**ISBN:** 9780761930129 (September 2008)

Mixed method research, combining quantitative and qualitative techniques, has become an increasingly popular way of both researching and teaching methodology across the social sciences. This text begins with an introduction to / overview of the development of mixed methodology, and then takes readers through all aspects of working with mixed methods from research design and data collection through to analysis and conclusions.

*Mixed Methods in Social Inquiry*

By Jennifer C. Greene

**ISBN:** 978-0-7879-8382-6 (October 2007)

Author has integrated diverse ways of thinking about mixed methods into a comprehensive and meaningful framework; compares, contrasts, and bridges multiple perspectives about mixed methods.

**INTERVIEWS**

*Advances in Telephone Survey Methodology*

By James M. Lepkowski, Clyde Tucker, J. Michael Brick, Edith D. De Leeuw, Lilli Japec, Paul J. Lavrakas, Michael W. Link, Roberta L. Sangster

**ISBN:** 978-0-471-74531-0 (November 2007)

Technology has changed substantially how survey firms collect data, from universal application of computer assistance to devices to record verbatim responses during interviews.

*Doing Interviews*

By Steinar Kvale

**ISBN:** 9780761949770 (April 2008)

Interviewing is an invaluable tool for the qualitative researcher. Provides coverage of both the theoretical background and the practical aspects of the interview process, incorporating discussion of the wide variety of methods in interview based research and the different approaches to reading the data.

*Interviews: Learning the Craft of Qualitative Research Interviewing, Second Edition*

By Steinar Kvale and Svend Brinkmann
Focuses on the practical, epistemological, and ethical issues involved with interviewing and includes a variety of interview forms including harmonious, empathetic interviews and confrontational interviews.

**INTERVIEWS (cont’d)**

**Standardized Survey Interviewing: Minimizing Interview-Related Error**
*By* Floyd Fowler, Jr. and Thomas W. Mangione
Defines a standardized interview, interviewer related errors and inaccuracies that arise during interviews, standardized interviewing techniques, the interviewer-respondent relationship, designing questions for interviews, the selection, training and supervision of interviewers, and reducing interviewer related error in interviews.

**The Telephone Interviewer’s Handbook: How to Conduct Standardized Conversations**
*By* Patricia A. Gwartney
Covers in a clear and direct manner all aspects of the interviewing process and incorporates the latest knowledge about what makes effective interviewers in today’s challenging survey environment.

**Telephone Survey Methods Sampling, Selection, and Supervision, Second Edition**
*By* Paul J. Lavrakas
*ISBN*: 9780803953079 (July 1993)
What quality control methods can be employed most effectively to structure and monitor interviews and convert refusals? What telephone numbers should be used in random digit dialing? How can eligible respondents be chosen and their cooperation secured? Addressing these and other survey issues, this completely revised edition of Telephone Survey Methods offers researchers a guide to thinking about and executing telephone surveys. From generating phone numbers to structuring the work of interviewers and supervisors, this book covers it all. New to this edition is a focus on the total survey error concept, a comparison of CATI with PAPI procedures, mixed-mode surveys, and new telecommunication technologies. In addition, the book covers such topics as how to control the sampling pool, how to identify the appropriate respondent, and how to improve on-the-job training of interviewers.

**FOCUS GROUPS**

**Doing Focus Groups**
*By* Rosaline Barbour
Focus groups are an ever popular method for collecting qualitative data in the social sciences. *Doing Focus Groups* provides practical advice on planning and organizing successful groups. Rose Barbour discusses the advantages and limitations of using group discussion and demonstrates effective methods for collecting and analyzing data.
FOCUS GROUPS (cont’d)

The Focus Group Kit: Volumes 1-6
By David Morgan, PhD and Richard A. Kruger

ISBN: 9780761907602 (September 1997)
You have just been asked to run a focus group, but you don't know where to start. How do you get the right mix of people together? How many people should be in your group? What kind of questions should you ask? How do you phrase them? What do you do with the information you've gathered? How do you put it all together into one cohesive report? The kit provides you with all you'll need to know to run a successful focus group, from initial planning stages to asking questions, from moderating to the final analyzing and reporting of your research.

By Richard A. Krueger and Mary Anne Casey
Offers the latest on telephone and Internet focus groups; provides suggested focus group questions; written for the person who has to plan, recruit, develop questions, moderate, analyze and report the results; Incorporates icons throughout the book that offer tips, examples, additional resources and others bits of practical information.

Focus Groups Theory and Practice, Second Edition
By David W. Stewart, Prem N. Shamdasani, Dennis W. Rook

Provides a systematic treatment of the design, conduct, and interpretation of focus group discussions within the context of social science research and theory. The book examines every facet of focus group research, from selection and recruitment of group participants, to the selection of a moderator, to conduct of the interviews, through the analysis of focus group data. Also included are discussions on designing the interview guide, the importance and influence of group composition, the art of conducting the focus group, and the characteristics of effective moderators.

ONLINE SURVEYS

Conducting Online Surveys
By Valerie M. Sue and Lois A. Ritter

ISBN: 9781412937542 (March 2007)
A comprehensive guide to the creation, implementation, and analysis of e-mail and Web-based surveys and issues unique to online survey research (selecting software,
designing Web-based questionnaires and sampling from online populations). Evaluates advantages and disadvantages of online surveys; how to use commercial survey software and web-hosting services.

ONLINE SURVEYS (cont’d)

Internet Data Collection
By Samuel J. Best and Brian S. Krueger

Describes how to perform each stage of the data collection process on the Internet, including sampling, instrument design, and administration. Through the use of non-technical prose and illustrations, it details the options available, describes potential dangers in choosing them, and provides guidelines for sidestepping them. Approaches the Internet as a unique medium that necessitates its own conventions.

Survey Monkey -- http://www.surveymonkey.com
basic web surveys only, some analysis and reporting

Zoomerang -- http://www.zoomerang.com
1. 800. 316. 0662 (San Francisco, CA)
basic web surveys only; some analysis and reporting

Survey Gizmo -- http://www.surveygizmo.com
1. 800. 609. 6480 x1 (Boulder, CO)
Offers range of services to create, manage, analyze and display data

Apian -- http://www.apian.com
1. 800. 237. 4565 or 1. 206. 547. 5321 (Seattle, WA)
integrates web and paper questionnaires; provides a solid interface to a database; has some decision analysis features

Survey Pro -- http://www.surveypro.com
1.800. 340. 9194 (Provo, UT)
Provides full range of services to create, manage, analyze, display and apply feedback data

Stat Pac -- http://www.statpac.com/surveys
1.715. 442. 2261 (Bloomington, MN)
oldest survey research software company, since 1978; full range of services to create, manage, analyze and display data

Question Pro -- http://www.questionpro.com/
1. 800. 531. 0228 (Seattle, WA; also locations worldwide)
provides full range of services to create, manage, analyze, display and apply feedback data

Vovici -- http://www.vovici.com
1. 703. 481. 9326 or 1. 800. 787. 8755 (Dulles, VA)
mid to high end service to create, manage, analyze, display and apply feedback data

CASE STUDIES

Guide to Case Studies
URL: http://writing.colostate.edu/guides/research/relval
By Jonathan Howell, Paul Miller, Hyun Hee Park, Deborah Sattler, Todd Schack, Eric Spery, Shelley Widhalm, and Mike Palmquist. (2005). Reliability and Validity. Writing@CSU. Colorado State University Department of English

Case Study Research Design and Methods, Fourth Edition
By Gabrielle Durepos and Robert K. Yin, Ph.D.
Covers more than 50 case studies, about one-quarter of them not cited in earlier editions, with vignettes of the case studies appearing throughout the text. New methodological insights cover the similarities between case studies and other social science methods. The book gives fresh attention to different quantitative analyses as they might be used as parts of case studies and also discusses more fully the use of mixed methods research designs.

RELATED TO SURVEY RESEARCH

http://www.socialresearchmethods.net/kb/contents.php
Comprehensive website related to applied social research and evaluation. It contains lots of resources and links to other locations on the Web that deal in applied social research methods.

http://www.surveysystem.com/sscalc.htm
(sample size calculator provided by Creative Research Systems)
Creative Research Systems
411 B Street Suite 2
Petaluma CA 94952
Tel: (707) 765-1001

http://www.amstat.org/sections/srms/
The American Statistical Association (ASA) is a scientific and educational society founded in 1839. The mission of the Section on Survey Research Methods is to promote the improvement of survey practice and the understanding of survey methods.
by encouraging both theoretical and applied research on survey-related topics and by disseminating information on survey methods.
SURVEY RESEARCH CENTERS

National Opinion Research Center (NORC)
University of Chicago
1155 East 60th Street
Chicago, IL 60637
(773) 256-6000

Has headquarters on the University of Chicago's campus, and offices in Chicago's downtown Loop, Washington, DC, Bethesda, Maryland, and Berkeley, California, as well as a field staff that operates nationwide. NORC's clients include government agencies, educational institutions, foundations, other nonprofit organizations, and private corporations. Although NORC's national studies are its most well-known, projects range from local to regional and international.

Project work is interdisciplinary, with strong staff cooperation across substantive and operational areas. NORC provides professional research services to a broad spectrum of clients and sponsors including government agencies at all levels, private foundations, colleges and universities, public-private consortia, policy organizations, associations, commercial firms, and others. NORC offers its clients many ways of collaboration.

Federal and certain other agencies can take advantage of NORC's federal supply schedule under the Mission Oriented Business Integrated Services (MOBIS) program operated by the General Services Administration. NORC is a federally qualified supplier under category 874-3, Survey Services. Services under the schedule encompass all aspects of survey research design, statistical activities, implementation, conduct, data analysis, and report writing.

Survey Research Center
University of Michigan
SRC Director's Office
1355 ISR Building
P.O. Box 1248
Ann Arbor, MI 48106
1. 734. 764. 8365

For more than 50 years, the Survey Research Center has been a national and international leader in interdisciplinary social science research involving the collection or analysis of data from scientific sample surveys. SRC offers multidisciplinary expertise for survey design and administration, sophisticated methodology and technology, research specialists in areas of current interest to planners and policymakers, consultation and other services directed to any component of survey design and analysis; SRC conducts multidisciplinary studies of the beliefs, attitudes, values, environment, and behavior of groups, organizations, and individuals in selected roles and settings, Interdisciplinary survey research, methodological research, surveys of large populations or of special sub-populations, face-to-face or telephone interviewing for surveys of national, state, regional, or local populations.
ACCESSIBILITY


Disability and Business Technical Assistance Center
To be automatically connected to your regional center, call 1. 800. 949. 4232

McCormick, Sally (Editor) (1999). Removing Barriers: Tips and Strategies to Promote Accessible Communication, produced by the North Carolina Office on Disability and Health with Woodward Communications; 1. 919. 966. 0868
http://www.fpg.unc.edu/~ncodh

Association of Science and Technology Centers, Inc.
1025 Vermont Avenue NW
Suite 500
Washington, DC 20005-3516
1. 202. 783. 7200
www.astc.org

Accessible Practices: www.astc.org/resource/access/index.htm
Practical information and personal experiences that address accessibility in museums; topics include accessibility advisory boards; accessible parking, entrances, information desks, retail, marketing, family restrooms, protruding objects, restaurants and assistive listening systems.
ACCESSIBILITY (cont’d)

DO-IT (Disabilities, Opportunities, Internet-working and Technology)
University of Washington
Box 355670
Seattle, WA  98195-5670
Voice / TTY:  1. 206. 685. 3648
Voice / TTY  (outside of Seattle): 1. 888. 972. 3648

Offers publications and fact sheets on hundreds of topics related to access and disability. One of their resource lists, titled Disability-Related Resources on the Internet, can be found at http://www.washington.edu/doit/Brochures/DRR

National Institute on Disability and Rehabilitation Research
Southwest Educational Development Laboratory
211 East Seventh Street, Suite 400
Austin, TX  78701-3281
Voice:  1. 800. 266. 1832
Voice / IT:  1. 512. 476. 6861
www.ncddr.org
www.ncddr.org/du/products/speical/html

  Provides invaluable information and publications on disability, user-friendly materials and alternative formats.

The Trace Research and Development Center, University of Wisconsin-Madison
www.tracecenter.org

  information on articles and guidelines about disability and making multimedia accessible (e.g., websites, kiosks and touch screens)

Access Board (U.S. Architectural and Transportation Barriers Compliance Board)
A Federal Agency Committed to Accessible Design (free bimonthly newsletter)
1331 F Street, NW, Suite 1000
Washington, DC  20004-1111
Voice:  1. 800. 872. 2253 x 0026 -- TTY:  1. 800. 993. 2822
www.access-board.gov

  Info on Accessibility Guidelines and info on electronics / technology (Section 508)

United States Department of Justice
Civil Rights Division
Disability Rights Section
P.O. Box 66738
Washington, DC  20035-6738
Voice:  1. 800. 514. 0301
TTY:  1. 800. 514. 0383
www.usdoj.gov/crt/ada/adahtm
ACCESSIBILITY (cont’d)

Federal Communications Commission
Voice: 1. 888. 225. 5322
TTY: 1. 888. 835. 5322
www.fcc.gov/cgb/dro

Offers technical assistance on the ADA’s telephone relay service requirements

Center for Assistive Technology and Environmental Access Georgia
Institute of Technology College of Architecture
www.catea.org
• click on ‘Projects’ on a tab across the top
• scroll down until you see blue rectangle saying “GRADE” (Georgia Tech Research on Accessible Distance Education)
• on the left hand side of the screen, click on ‘Access e-learning tutorial’ to learn more about making the following accessible:

1. Disabilities in Distance Education
2. Planning for Accessibility in Distance Education
3. Making PowerPoint Slides Accessible
4. Making Video Accessible
5. Making Flash Accessible
6. Making Word Documents Accessible
7. Making Excel Documents Accessible
8. Making PDF Documents Accessible
9. Making Web Pages Accessible
10. Making Scripts and Java Accessible

Watchfire® Bobby™
www.watchfire.com

Watchfire® Bobby™ is a comprehensive Windows-based accessibility desktop tool designed to help expose barriers to accessibility and encourage compliance with existing accessibility guidelines, including Section 508 of the Rehabilitation Act and the W3C’s Web Content Accessibility Guidelines.

W3C’s Web Content Accessibility Guidelines
http://www.w3.org/TR/WCAG10/full-checklist.html