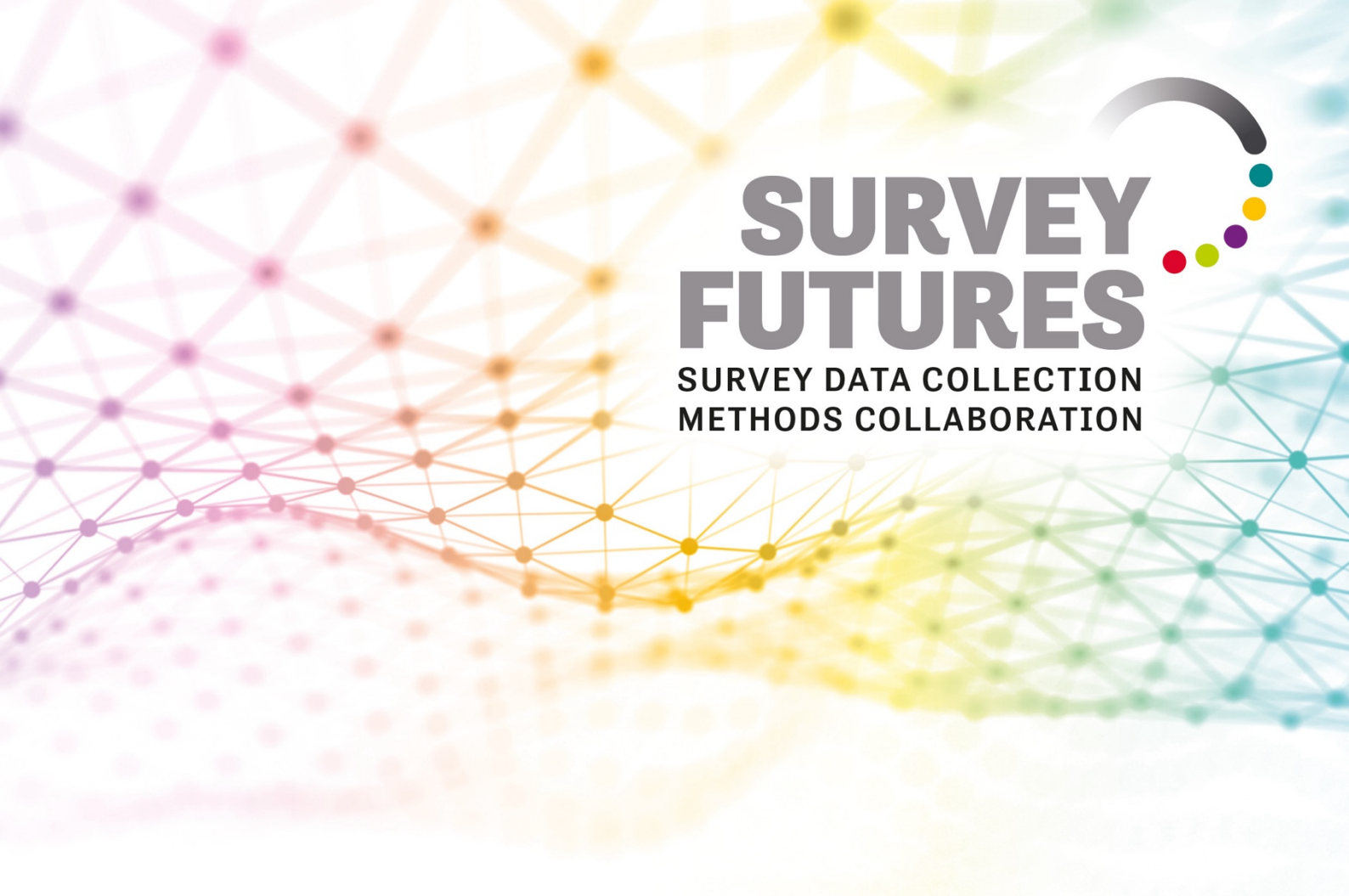




SURVEY FUTURES

**SURVEY DATA COLLECTION
METHODS COLLABORATION**

Report 2: Training and Capacity Building

**Report on Workshop with Stakeholders,
November 2023**

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www.surveyfutures.net

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1. Introduction

1.1 Survey Futures

Survey Futures is an Economic and Social Research Council (ESRC)-funded initiative (grant ES/X014150/1) aimed at bringing about a step change in survey research to ensure that high quality social survey research can continue in the UK. The initiative brings together social survey researchers, methodologists, commissioners and other stakeholders from across academia, government, private and not-for-profit sectors. Activities include an extensive programme of research, a training and capacity-building (TCB) stream, and dissemination and promotion of good practice. The research programme aims to assess the quality implications of the most important design choices relevant to future UK surveys, with a focus on inclusivity and representativeness, while the TCB stream aims to provide understanding of capacity and skills needs in the survey sector (both interviewers and research professionals), to identify promising ways to improve both, and to take steps towards making those improvements. Survey Futures is directed by Professor Peter Lynn, University of Essex, and is a collaboration of twelve organisations, benefitting from additional support from the Office for National Statistics and the ESRC National Centre for Research Methods. Further information can be found at www.surveyfutures.net.

1.2 Training and capacity building (TCB) goals

The goals of the training and capacity building (TCB) workstream are to develop:

1. a better understanding of the methodological skills that are needed by survey research staff across sectors and of the barriers and challenges in building survey methodology capacity in the UK, and
2. opportunities for survey research staff to enhance their methodological expertise and skills and to facilitate knowledge exchange and training opportunities for researchers at different career stages, working in different contexts. This includes knowledge mobilisation, i.e. making opportunities and information useable and accessible through collaborative working on research funded through the Survey Futures programme.

This report is concerned with the first goal, providing information on perceived knowledge, skills and training needs and barriers for survey research staff across the industry and career stages. This information will be used by the Survey Futures TCB lead researchers and the TCB forum to develop proposed actions to address needs and challenges.

In this report, the term survey research staff is used to describe those working with social surveys in a range of different roles – in their design, conduct, and analysis – across academia, central and local government and governmental bodies, the private and third sectors. It includes research staff across the career life course, including early career researchers (ECRs) and those with more experience.

1.3 TCB workshop

In support of the first TCB goal the TCB core team, led by Prof Gabriele Durrant at the National Centre for Research Methods (NCRM) and the University of Southampton and Dr Debbie Collins (National Centre for Social Research, hereafter referred to as NatCen) organised an online workshop with stakeholders to identify training needs and priorities in survey methodology and survey data collection. The workshop was advertised through Survey Futures, the NCRM, NatCen and the Local Area Research and Intelligence Association, with key stakeholders receiving a personalised invitation (see Appendix A1).

The two-hour workshop took place on 15th November 2023, involving around 40 key representatives from across academia, government, public and not-for-profit sectors in England, Northern Ireland, Scotland and Wales (see Appendix A2 for a list of organisations represented). The online workshop was hosted using Zoom, a video-conferencing platform. Participants took part in two interactive sessions. The first explored the training needs of survey research staff. Workshop participants were given a list of training needs identified from earlier stakeholder engagement activities to consider and discuss, see Figure 1. This list was compiled following a review of:

- Various training needs assessments and consultations conducted by NCRM; and
- From two ‘Mind the Gap: Survey Statistics in Practice’ sessions convened by NatCen at the 2022 NCRM MethodsCon conference with survey statisticians, quantitative researchers and analysts.

These sessions explored the current challenges faced by those working in these roles with social surveys and the knowledge and skills that they felt needed to be developed and strengthened to address these challenges.

Figure 1 List of training needs identified from earlier stakeholder engagement activities and presented to workshop participants

- | | |
|--|-------------------------------------|
| • Research design | • Design strategies that address: |
| • Research ethics | • selection bias |
| • Quantitative data analysis | • non-response |
| • Longitudinal research | • missing data |
| • Computational methods | • Analysis strategies that address: |
| • Data linkage | • selection bias |
| • Using non-survey data sources to augment survey data | • non-response |
| | • missing data |

Using Zoom’s break out group functionality, participants were randomly assigned to one of five small groups. Each group contained a moderator, who facilitated discussion using a discussion guide (see Appendix A3) and made notes on what was discussed. In these small groups, workshop participants were asked to consider the list of training needs (Figure 1) and discuss:

- Any training needs that participants thought were missing from the list;

- More specific training needs;
- Training needs for different groups, such as early career researchers and more experienced research staff;
- Training priorities – both immediate and longer term.

In the second interactive session, in the same small groups, participants produced a specification of training requirements, considering risks and mitigations, for one (or more, if time allowed) training priority areas. Copies of the workshop slides and instructions to workshop participants are reproduced in Appendix A4.

This report summarises these workshop discussions, identifying participants' current training priorities, and considers next steps following on from the workshop. Survey Futures TCB activity will continue over the life of the grant – through to end June 2026, and updates on TCB progress will be produced.

2. Training needs and priorities

This chapter summarises the training needs and priorities identified by workshop participants. The term training refers to knowledge exchange and skills development activities. Needs reflect the personal views of the workshop participants and their perceptions of the knowledge and skills survey researchers need to possess. With few exceptions, participants were experienced survey researchers with responsibility for the development of other survey researchers.

Workshop participants discussed a list of training needs based on previous stakeholder engagement activities, see section 1.3. In this chapter, those discussions are summarised. Sections 2.1 and 2.2 consider the knowledge and skills training needs that they felt were missing from the list presented to workshop participants or that needed further elaboration (section 2.2). The training needs of different groups are discussed in section 2.3. The priorities proposed by workshop participants are presented in sections 2.4. Participants also had some ideas on how training needs might be met, which are presented in section 2.5. Findings are summarised in section 2.6.

2.1 Missing Training Needs

Knowledge and skills felt to be missing from the list (see Figure 1) were as follows.

- The (potential) **use of emerging technologies**, including artificial intelligence (AI) in survey research. Participants wanted
 - Use cases/ examples of where survey researchers are using AI technology
 - To understand the impact of use of AI on survey data quality
- **Mixed methods research design**, involving combining quantitative and qualitative research methods in a single study¹
- Soft skills
 - **effective communication of complex and technical information** to different audiences, including policymakers. A particular area highlighted was the communication of the pros and cons of survey research designs between the survey agency, client and other stakeholders.
 - **problem solving, critical and creative thinking**. Problem solving and critical thinking skills were seen as supporting technical research skills, such as evaluating different survey designs and making design decisions. Creative thinking skills were also becoming more important, enabling researchers to develop innovative solutions to research problems.
- **How to commission a survey**. Aimed at organisations with little/no experience of commissioning survey research, there was a perceived need for guidance on writing research specifications and how to evaluate research proposals.

It was also suggested that survey research staff should develop a **wider set of research skills**. This could include learning methods used in other disciplines (no examples were

¹ See Johnson, Onwuegbuzie and Turner (2007) for a discussion how mixed methods research may be defined.

provided) and developing a broader repertoire of skills, such as quantitative researchers learning qualitative data analysis skills to analyse free (open) text survey responses.

The list was also thought to be missing the UKRI **Future Leaders Fellowships (FLF) pipeline**. FLF supports the development of the ‘most talented early career researchers and innovators’ as well as helping to attract new people into the industry.² However, specific survey research methods skills that would support the FLF pipeline were not discussed.

2.2 Elaboration of training needs

In addition to identifying training needs that were missing from the list, workshop participants also elaborated on the following needs that were included in the list shown to workshop participants.

- Survey research design
- Survey research ethics
- Data linkage
- Using non-survey data sources to augment survey data
- Technical and survey research methods skills and knowledge.

These needs are described in the rest of this section.

Survey research design

Survey designs were felt to be becoming more complex. There was broad agreement that survey research staff need ongoing knowledge and skills development in survey research design so that designs continue to meet the needs of users and stakeholders. Participants also recognised that the survey landscape is changing due to factors such as the COVID-19 pandemic, a greater policy focus on equity and inclusion, and advancements in digital technology, including artificial intelligence (AI). Survey designers need to understand and respond to these changes.

Evaluating different survey design options is considered an essential skill in survey research, requiring an understanding of the advantages and disadvantages of various data collection methods. Researchers need to comprehend the **factors that affect survey data quality**, an area where knowledge in the sector needs improvement. This underscores the importance of the research context in methodological decision-making. The discussion also emphasised that survey commissioners must understand how survey data quality impacts estimates and policy decisions. Survey designers should be able to provide commissioners with clear, non-technical assessments of different designs and their implications for data quality.

There was a view that the industry as a whole needed to **learn from the impact of the COVID-19 pandemic on surveys**, particularly:

- how nonresponse and nonresponse bias affect survey estimates, with reference to case study examples
- design and post-survey adjustment strategies that are effective in mitigating against declining response rates.

<https://www.ukri.org/what-we-do/developing-people-and-skills/future-leaders-fellowships/>. Accessed 29/07/2024.

A repeatedly stated need was for **survey design good practices**, particularly in relation to the design of mixed mode surveys and in mitigating non-response bias.

There was broad consensus that a knowledge gap exists around **inclusivity and cultural understanding** in survey research design. It was suggested that better understanding of cultures and inclusive research practices would improve research designs by addressing the needs of various communities, demographics, and regions. Additionally, efforts to increase the diversity of professionals in survey research were acknowledged and welcomed.

Improving understanding of the **operational possibilities and constraints in collecting survey data** is important, as is deepening understanding of the realities of survey data collection, particularly among those in roles that are distant from data collection, such as survey analysts.

Research ethics and data protection

Knowledge and training in research ethics and data protection is felt important, with survey research staff needing a good understanding of:

- Ethical principles, such as informed consent and risk of harm
- Data protection, highlighting the key aspects of regulation that relate to surveys and the steps to take to ensure compliance
- Statistical disclosure control
- Ethical governance e.g. ethics boards
- Safeguarding.

Data linkage

The need for training in data linkage was highlighted, with some suggestions for content being made, listed below.

- Gaining access to data sources that researchers wish to link to
- Data linkage good practices
- Ethical, data protection and statistical disclosure control considerations.

Using non-survey data sources to augment survey data

There is a need for greater understanding of the possibilities and challenges of combining non-survey and survey data. Participants wanted to understand (more) about:

- What non-survey data sources existed and what topics were covered by these data sources
- The strengths and limitations of different data sources, including biases and methodological differences that can impact data quality
- Weighting and imputation approaches
- Data fusion approaches.

Technical and survey research methods skills training and knowledge building

Technical and survey research methods skills involve a knowledge of specific research methods and techniques. Participants felt that training in core technical and research

methods skills, such as **survey sampling, questionnaire design, and survey weighting**, remained important.

Suggested knowledge and training in **questionnaire design** included how to measure concepts and the steps involved in developing questions to measure concepts, and how to find existing measures e.g., using the UK Data Service Variable and Question Bank.

Additional, more specialised training in **weighting longitudinal data** and in **dealing with mode effects** was needed. There was also a need for more training in the use of **qualitative methods**, such as **cognitive interviewing and user experience (UX)** methods, to support questionnaire design and survey participation (e.g., the design of survey invitations). Training in **the application of behavioural insights** to survey design was also suggested.

Survey researchers need to **understand the nature and impact of mode effects on survey estimates**, particularly in relation to mode change within longitudinal surveys. However, this was not necessarily a training need: further research and discussion of findings within the research community could be just as effective participants felt.

2.3 Training needs for different groups

There was limited time for discussion of the training needs of different groups, such as early career researchers. Where groups did discuss this topic, the following issues and needs were identified.

- The training needs of ECRs and more experienced researchers will differ, reflecting their differing roles and responsibilities.
- More experienced survey research staff need knowledge that enables them to critique and quality assure survey research designs and outputs, whereas ECRs need to learn and develop their research skills. To illustrate this point, it was suggested that more experienced researchers need an understanding of what good survey questionnaire design looks like and the steps involved in the development of good survey questions, whereas ECRs need training and experience in questionnaire design.
- One suggestion was that ECR training should focus on putting theory (learned at university) into practice, and developing soft skills such as team working and networking.
- Experienced researchers needed to understand (more about) new survey methods and more complex survey designs, for example involving different sources of data or different modes of data collection.

Knowledge and skills development did not always require a training course, with participants suggesting other options, see section 2.5.

2.4 Training capacity building priorities

The task of identifying and agreeing training priorities was tricky for some groups, given the limited time available. However, all groups managed to come up with a list of training priorities, shown in table 1. There are several things to note.

- Priorities varied, with research design being the only topic to feature on more than one group's priority list. Such variation is not surprising given the breadth of the subject and the variety of roles and contexts within which participants were working.
- Training priorities applied across different career stages, albeit with some differentiation of content.
- Training priorities include both immediate and longer-term needs.
- Some training priorities were more clearly articulated than others. Further work is needed to unpack some training priorities, particularly
 - Factors shaping survey design decisions
 - Problem diagnosing and solving
 - Computational methods
 - AI and emerging technologies.

Table 1 Training priorities

Group 1	Group 2	Group 3	Group 4	Group 5
How to evaluate research designs	Data collection	Data Protection and Ethics	Research design - what is "good".	Mixed mode survey design
Factors shaping survey design decisions	Data quality	Computational methods	Questionnaire design	Data access/ data linkage
Problem diagnosing and solving	Research design	Commissioning surveys	Complex weighting	Response rates and non-response bias
Survey operations constraints				AI / emerging technologies
Communicating complex and technical information to a range of audiences				

2.5 Suggestions for meeting training and capacity building needs

Workshop participants proposed ways in which skills gaps could be met. Whilst training courses were very useful, other forms of training and knowledge exchange were also valuable, such as webinars, workshops, conferences, and online resources e.g., guidance notes and practice guides. Some differentiation of content may be required, with more advanced training courses and materials stating the prerequisite knowledge assumed.

There was also a suggestion that existing undergraduate/ postgraduate courses could include (more) content on the knowledge and skills highlighted in this report. However, it was also recognised that a lot of research methods learning happens on-the-job (as experiential learning). Work experience - placements and internships within organisations, or secondments across organisations could support the development of research methods skills, greater interdisciplinarity and innovation.

Workshop participants also highlighted the importance of networking in the development of survey research skills and knowledge. Learning events, such as seminars, webinars and conferences provide potential opportunities for networking with other survey research staff. Networks such as CLOSER were cited as exemplars that could act as templates for setting up survey research networks on particular topics.

2.6 Summary

Table 2 summarises the knowledge and skills training needs identified by workshop participants as missing from the list (see Figure 1) and or needing further elaboration. This summary table differentiates between:

- Knowledge needs - theories, concepts, ideas, research findings etc., and
- Skills needs – practical application of knowledge to research problems.

It also differentiates between foundational and additional knowledge needs.

- Foundational knowledge requires understanding key survey concepts and methods and their strengths and weaknesses.
- Additional knowledge builds on and extends foundational knowledge, developing understanding of new techniques, theories, and approaches and in evaluating different design options.

Training incorporates not only courses but other knowledge exchange activities – workshops, webinars, conferences – and resources – guidance, best practices, examples.

Discussion of how the knowledge and skills needs identified by workshop participants will be taken forward are discussed in chapter 3.

Table 2 Survey Research Design and Methods Knowledge and Skills Needs

Topic	Foundational knowledge needs	Additional knowledge needs	Skills training needs
Survey data quality (Priority)	• Survey data quality • Measures of survey quality e.g. non-response bias	• Factors that affect survey data quality • Relationship between survey data quality and survey design	• Assessing survey data quality during and after data collection • Evaluating the quality of different survey designs
Survey design, including mixed mode survey design (Priority)	• Key survey concepts: measurement, representativeness, error and bias • Theories and frameworks underpinning survey research, e.g. Total Survey Error (TSE) Framework • Advantages and disadvantages of different modes of data collection • Understanding of mode effects – measurement and representation	• Application of behavioural insights to survey design • Survey design good practices • Learning from the COVID-19 pandemic: - o the impact of changes in survey designs on survey estimates, e.g. non-response bias, measurement error - o survey design and post data collection strategies found to mitigate non-response bias and/or	• Application of behavioural insights to survey design (e.g. respondent communications) • Evaluating different survey design options (e.g. using the TSE), identifying pros and cons and design trade-offs • Application of inclusive survey design principles • How survey designs impact survey estimates, using real-life examples (e.g. from the COVID-19 pandemic) • Designing, analysing, and interpreting

Topic	Foundational knowledge needs	Additional knowledge needs	Skills training needs
		measurement error • Designing experiments to assess the impact of different survey designs • Understanding of inclusive survey research design principles and practices • New survey research methods and design approaches e.g. working with non-survey data	survey design experiments • Data linkage, including gaining access to data sources that researchers wish to link to and good practices
Survey practicalities (Priority)	• Operational considerations and constraints that effect surveys • Survey data collection in practice		• Observing survey data collection in practice • Observing coding of open survey questions • Sitting in on interviewer briefings
Research ethics and data protection (Priority)	• Ethical principles e.g. informed consent, risk of harm • Data protection principles and legal requirements	• Statistical disclosure control • Ethical governance	• Ethical decision-making in survey research • Application of data protection principles to survey research

Topic	Foundational knowledge needs	Additional knowledge needs	Skills training needs
Data linkage (Priority)	Principles of data linkage	- How to gain access to data sources - Data linkage good practices - Ethical, data protection and statistical disclosure control considerations	- Data linkage steps and techniques - Application of good practices
Emerging technologies, including AI (Priority)	Emerging technologies, including AI and their application to survey research	- Use cases/ examples of emerging technologies/ AI use in surveys - Quality issues arising from the use of emerging technologies	- How to work with emerging technologies, including AI - Ways of evaluating emerging technologies e.g. assessing risks, data quality
Effective communication of complex and technical information (Priority)	Not discussed	Not discussed	Communicating the pros and cons of survey designs with different stakeholders
Commissioning surveys (Priority)	Good practices	- Governance processes - Factors affecting survey costs - Judging survey data quality	- Writing survey research specifications - Evaluation of research proposals
Questionnaire design and testing (Priority)	- Measuring concepts - Good question design principles	- Redesigning surveys for different modes - Understanding optimum design	Use of qualitative methods such as cognitive

Topic	Foundational knowledge needs	Additional knowledge needs	Skills training needs
	• How to find existing questions/measures • Cognitive testing/ UX methods	• Testing cycles in questionnaire development, e.g. agile methods	• interviewing and UX methods
(Complex) Weighting and adjustment strategies (Priority)	• Principles of survey weighting	• Weighting longitudinal data • Complex weighting for cross-sectional surveys • Adjustment strategies for mitigating mode effects	• Weighting longitudinal data • Weighting for complex cross-sectional survey designs
Computational methods (Priority)	• Understanding of computational methods	• Not discussed	• Not discussed
Combining non-survey data sources with survey data	• Understanding possibilities and challenges of combining survey and non-survey data • Non-survey data sources and topics covered	• Understanding the strengths and limitations of different data sources, including biases that can impact data quality • Weighting and imputation approaches • Data fusion approaches	• Working with non-survey data • Weighting and imputation approaches • Data fusion approaches
Mixed methods	• Mixed methods research design principles • Types of designs	• Not discussed	• Designing mixed methods research involving surveys:

Topic	Foundational knowledge needs	Additional knowledge needs	Skills training needs
			principles and practices
Problem solving, critical and creative thinking	• Not discussed	• Not discussed	• Skills development (no details provided)
Survey sampling	• Key concepts and principles • Pros and cons of different sampling methods	• Not discussed	• Not discussed

3. Conclusions and next steps

In discussing training needs, workshop participants reflected upon the research skills they felt were important for survey research staff to have. Foundational knowledge of survey research design, sampling (random probability and non-random probability methods), data collection including questionnaire design, non-response and non-response bias, and survey weighting was felt to be essential, regardless of job role (e.g., survey researcher, analyst, research commissioner). The ability to evaluate different survey research designs and methods, was viewed as an important skill, built on these foundations, requiring a knowledge of survey concepts such as representativeness, non-response bias, measurement error, and survey quality.

As survey designs become more complex, for example through the growing use of mixed mode data collection and non-survey data, researchers need to develop their knowledge and skills to work with these kinds of designs and data. Skills identified include how to assess different mixed mode design options and communicate not only their pros and cons but their potential impacts on survey estimates and policy decisions. There is also a growing need to know how to access and assess the quality of non-survey data, and how to combine different kinds of data in research. An appreciation of the contextual factors that can shape research designs was also highlighted by participants as being important, such as the funding available, and the wider (government) policy landscape.

For some participants, developing knowledge and skills in the use of computational methods and emerging technologies, including AI was important. These needs were expressed in general terms - understanding more about them and their pros and cons – rather than specifying specific computational methods, technologies and AI tools where training is needed. This is an area to keep under review, given the rapid pace of change in these areas.

Workshop participants highlighted the importance of both core and advanced methods skills and the roles of on-the-job training, attendance at seminars, conferences, and workshops as well as formal training courses in supporting skills development. The priority placed on soft skills such as communication is important when thinking about developing training courses and training resources. Universities, industry professional bodies and employers need to work together to ensure that the survey research pipeline and Future Leaders' pipelines are maintained and strengthened. Universities play an important role in equipping students with the research design and survey research methods skills needed by employers, with employers and professional bodies developing these skills further through provision of continued professional development activities including on-the-job training. The new social research degree apprenticeship scheme, initiated by Government Social Research (GSR) and involving employers from across government, research agencies and institutes, will also play an important role in strengthening the pipeline.

3.1 Next steps

There are many existing survey research methods training short courses and resources available. However, it is not clear whether current provision covers the areas of need identified by workshop participants. We, the TCB leads of Survey Futures, will explore what can be done to:

- Map current short course and learning resource provision in relation to the knowledge and training needs identified in this report
- Improve signposting to existing training short courses and resources.

These points will be explored with training providers such as the National Centre for Research Methods (NCRM) and professional bodies, such as

- Government Social research (GSR)
- Government Economic Service (GES)
- Government Statistical Service (GSS)
- Local Area Research and Intelligence Association
- Market Research Society (MRS)
- Royal Statistical Society (RSS)
- Social Research Association (SRA)
- UK Evaluation Society.

In this context it should be noted that NCRM operates a comprehensive database of research methods training (not just on survey related training but on any research methods training in the UK). TCB providers are strongly encouraged to enter their courses and other TCB activities there to offer users the opportunity to easily find information in one place. The database can be found here: <https://www.ncrm.ac.uk/training> (please use the button option 'Add Event' to enter TCB activities).

Organisations continue to invest in the development of their staff working with surveys – both their research methods and generic research skills. Whilst formal training courses play a part, on the job training and opportunities to meet and interact with other survey research staff are also important. The best practice guidance produced as part of Survey Futures will contribute to staff development, and we will work with project leads to ensure this guidance is accessible to all working with surveys.

Survey Futures research will afford opportunities to bring those working with surveys together to discuss findings and consider actions. We will work with Survey Futures research project leads to make the most of these opportunities to share knowledge (e.g. best practices, webinars) and develop skills (e.g. how-to guides, short courses).

References

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Appendix A – Workshop invitation and guide

A1 Email invitation to participate in the training needs workshop

Title: Invitation – ‘Survey Futures’ training and capacity building needs workshop

Dear [name]

The ways in which we undertake social surveys are changing and becoming more complex. There are concerns that the skills needed to design, analyse and commission social surveys are changing and that the training of survey researchers may not be fit for purpose. The Economic and Social Research Council (ESRC) has funded work to explore the training and capacity building needs of the social survey research sector, as part of the Survey Futures project.

We are writing to you, as someone with a vested interest in the training and development of (future) survey researchers, statisticians, analysts, commissioners and consumers of social surveys, to invite you to take part in a 2-hour, online workshop to discuss training and capacity building needs, gaps and action. This is a unique opportunity to contribute to identifying urgent skills gaps and to articulate training and capacity building needs and actions. This workshop is being co-ordinated by the National Centre for Research Methods (NCRM) in partnership with the National Centre for Social Research (NatCen), as part of the ESRC-funded Survey Futures project.

The workshop will take place on **Wednesday 15th November 2023, 13:00-15:00, and will take place on Zoom.**

You will shortly receive a calendar invitation, to which we ask you to reply to as soon as possible to indicate your interest in participating in the workshop. Confirmation of your place will be confirmed within the next few weeks. Please note that workshop places are limited and that we may need to restrict the numbers of people attending from individual organisations and sectors so as to include as wide a range of organisations as possible.

Further information about the workshop, including its purpose, what taking part will entail, and outputs from the workshop are provided in the information below.

If you have any questions or queries, please do not hesitate to contact [Name, email address].

With best wishes

Debbie and Gabi

Debbie Collins (NatCen)

Prof Gabriele Durrant (National Centre for Research Methods and University of Southampton)

Information about the Survey Futures Training and Capacity Building Needs Workshop

What is Survey Futures?

Survey Futures is an ESRC-funded project that is seeking to address challenges facing survey research. These challenges include implementing surveys using pre-pandemic approaches, the increasing complexity of survey designs, and the limited capacity of survey research professionals.

Aims and purpose of the workshop

This workshop will involve participants in:

- Identifying and prioritising what training and capacity building provision is needed, the kinds of provision (e.g. training, networks) and in what topic areas; and
- Generating ideas about ways to improve capacity and the skillsets of survey researchers.
- Providing a steer to the Survey Futures research projects on the kinds of best practice guidance that will be useful;

In understanding the training and capacity needs of the survey research community, we will develop guidance for Survey Futures research teams that they will use to plan their training and dissemination activities.

We will also produce a summary of findings, with suggestions for future training and capacity building activities, which will be shared with training providers and stakeholders, such as the Government Statistical Service (GSS), Government Social Research (GSR), Social Research Association (SRA), Market Research Society (MRS) and Local Government Association (LGA).

What is involved in taking part

Taking part will involve participating in a 2-hour online discussion, via video-conference. Researchers will provide background information and facilitate discussion on topic areas in small groups.

The workshop will be led by researchers from NatCen, with support from colleagues at the National Centre for Research Methods (University of Southampton) and the Office for National Statistics.

Will the workshop be recorded?

We are planning to record the workshop for the purpose of generating a complete and accurate record of issues discussed. This recording will be stored securely by NatCen. Only the NatCen researchers involved in the workshop will have access to the recording, and it will be securely deleted once a written record of the workshop has been produced.

Will I be named in the published report?

In publishing findings from the discussion, we plan to list participating organisations. Participants will be sent drafts of guidance and the summary report for comment, prior to finalisation, as well as receiving final versions.

Who should I contact if I have any queries?

If you have any questions or queries, please contact: [name, email address].

A2 Organisations represented by those who accepted the workshop invitation

- Cohort and Longitudinal Studies Enhancement Resources (CLOSER)
- Department for Transport
- Department for Work and Pensions
- European Commission
- Ipsos
- Kantar Public (now known as Verian)
- Market Research Society
- National Centre for Social Research (NatCen)
- NHS England
- Northern Ireland Longitudinal Study Research Support Unit (NILS RSU)
- Office for National Statistics
- Scottish Government
- University College London
- University of Cardiff
- University of Essex (ISER)
- University of Exeter
- University of Southampton
- University of Stirling
- Warwickshire County Council

Note that 75 people accepted the invitation, with some organisations having multiple people accepting (Ipsos, Kantar Public, NatCen, ONS, University College London, and the Universities of Cardiff, Southampton, and Stirling). A record of who actually attended was not kept, and as such some of the organisations listed may not have actually participated in the workshop.

A3 Training needs workshop guide

1. Introductions (10mins) *Debbie*

- Welcome
- Debbie & Gabi introduce themselves
- Purpose of workshop – what we want to achieve
- Workshop plan : sessions, timing, break
- Housekeeping and participation
- Recording of the discussion
- Questions

2. Training needs for researchers, analysts, statisticians working with surveys - 45 mins

Aim: Understand training needs and priorities

Introduction to whole group (Debbie)– 5 mins

- Slides setting out the context in which we are discussing TCB
- Slide Training needs – needs identified from earlier consultations
- Slide Task - list of needs: what is missing? What are should be training priorities?
- Any Qs?

Put participants into 5 groups

In Groups [40 minutes]

Facilitator: show slide listing previously identified training needs as prompt for discussion and add to/amend list in light of discussion. Use notes proforma to capture key points from discussion

Facilitator: encourage reflection on the list to identify:

- Missing training needs
- More specific training needs
- Training needs for different groups
 - Career stages: entry level, early career (up to 5yrs), established (6yrs+)
 - Roles e.g. survey analysts, statisticians, researchers
- Reflect on list and identify priorities: immediate and longer term

Everyone back in main room: Go to break

Break [10 mins]

[Facilitators: meet and feedback on needs and priorities. Workshop chair to summarise on slide for next session]

3. Addressing training needs

Aim: Produce specification for addressing training need

Introduction to whole group – 6 mins Debbie

- Debbie to summarise discussion from first session, sharing priorities identified by each group

Debbie introduces task.

- In your groups you are going to pick a training priority from the list and consider what is needed. You are aiming to produce a specification of requirements, identifying potential risks and mitigations. Your group facilitator with support you in this task.
- If you have time, pick another training priority and produce specification for that.
- Any questions?

In same small groups: Work on specification – 40 minutes

Facilitator: Get group to pick a topic need and develop specification. To do this you need to explore needs and get the group to think about how needs can be addressed through Survey Futures and its partnerships, e.g., with NCRM.

Prompt for:

- What do staff need to know/ be able to do in relation to the topic?
- What can be done to address these needs?
 - o Type – e.g. course, guidance, network
 - o Form – e.g. interactive course, instructional video, online resources – probe for detail
 - o Sharing of resources/ highlighting existing good practices
- Risks:
 - o Consequences of not having training/guidance
 - o Usefulness/applicability to participant's context
- What can be done to manage risks

Facilitator: Use note proforma to capture key points. At end of session provide short, 2-minute feedback to whole group, summarising which training needs were discussed and high level summary of plans to address needs

4. Wrap up [10 minutes] – led by Debbie

Facilitators: Summarise discussions in your group [2 mins each group]

Next steps – Debbie & Gabi [4 mins]

- Will produce a short summary report on the workshop & share with you, Survey Futures team and ESRC
- Findings will be shared with the Survey Futures research work package leads – inform the outputs from this research
- Conversation about training and capacity building will continue through the Survey Practice and TCB forums
- Thank everyone for their involvement today

A4 Workshop slides



Survey Futures: training and capacity building workshop

November 2023

Prof Gabriel Durrant and Debbie Collins

Workshop structure

1. Welcome and introductions [10 mins]

2. Training & development needs for researchers, analysts and statisticians working with surveys [40 mins]

Break [10 mins]

3. Addressing training & development needs [45 mins]

4. Feedback on session 3 and wrap up [15 mins]

• Sessions 2 and 3 involve discussion in small groups

2. Training needs

Context

- Social survey researchers need strong quantitative research skills
- Survey design, data management, data analysis and statistical inference skills commonly feature in research skills frameworks, as well as communication skills – verbal and written
- Q-Step initiative aimed to improve the quantitative skills of social science graduates
- New ESRC Postgraduate Training and Development Guidelines emphasise research practice and work experience. Recent ESRC data-driven skills report
- Survey landscape is changing: designs are becoming more complex
 - e.g., mixed mode, oversampling of subgroups, mixing prob & non prob sampling designs, combining data from different sources, technological change e.g., AI

Context: ESRC's aspirations for Survey Futures

"The funding will ensure:

- the UK's social surveys can continue to effectively capture complex phenomena across different modes as well as deliver inclusive data that reflect the experiences of everyone in society
- social survey commissioners, directors and users can effectively assess data quality and manage mode effects as data collection modes diversify
- methodological innovations in survey methods are developed and widely disseminated, upskilling researchers and leading to improved survey practice in the UK and beyond"

Source: <https://www.ukri.org/opportunity/the-survey-data-collection-methods-collaboration/>

Training needs: now and for the future

National Centre for Research Methods
most recent assessment of training needs
indicated

- Continued need for training in core research methods including:
 - Research design, research ethics, quantitative data analysis, longitudinal research
- Computational methods

2022 MethodsCon session with survey
statisticians, researchers & analysts
highlighted training needs in:

- Data linkage
- Using non-survey data sources to augment survey data
- Design & analysis strategies that address: selection bias, non-response, missing data

Thoughts on this list. What training needs are missing? What should be the priorities?

- Research design
 - Research ethics
 - Quantitative data analysis
 - Longitudinal research
 - Computational methods
 - Data linkage
 - Using non-survey data sources to augment survey data
- Design strategies that address:
 - selection bias
 - non-response
 - missing data
 - Analysis strategies that address:
 - selection bias
 - non-response
 - missing data

Training and development needs – issues to consider



How do training needs vary by career stage?



How do training needs vary by role?



What should the priorities be?



Priorities – top 3

3: Meeting training needs

Addressing training needs: issues to consider



Content needs



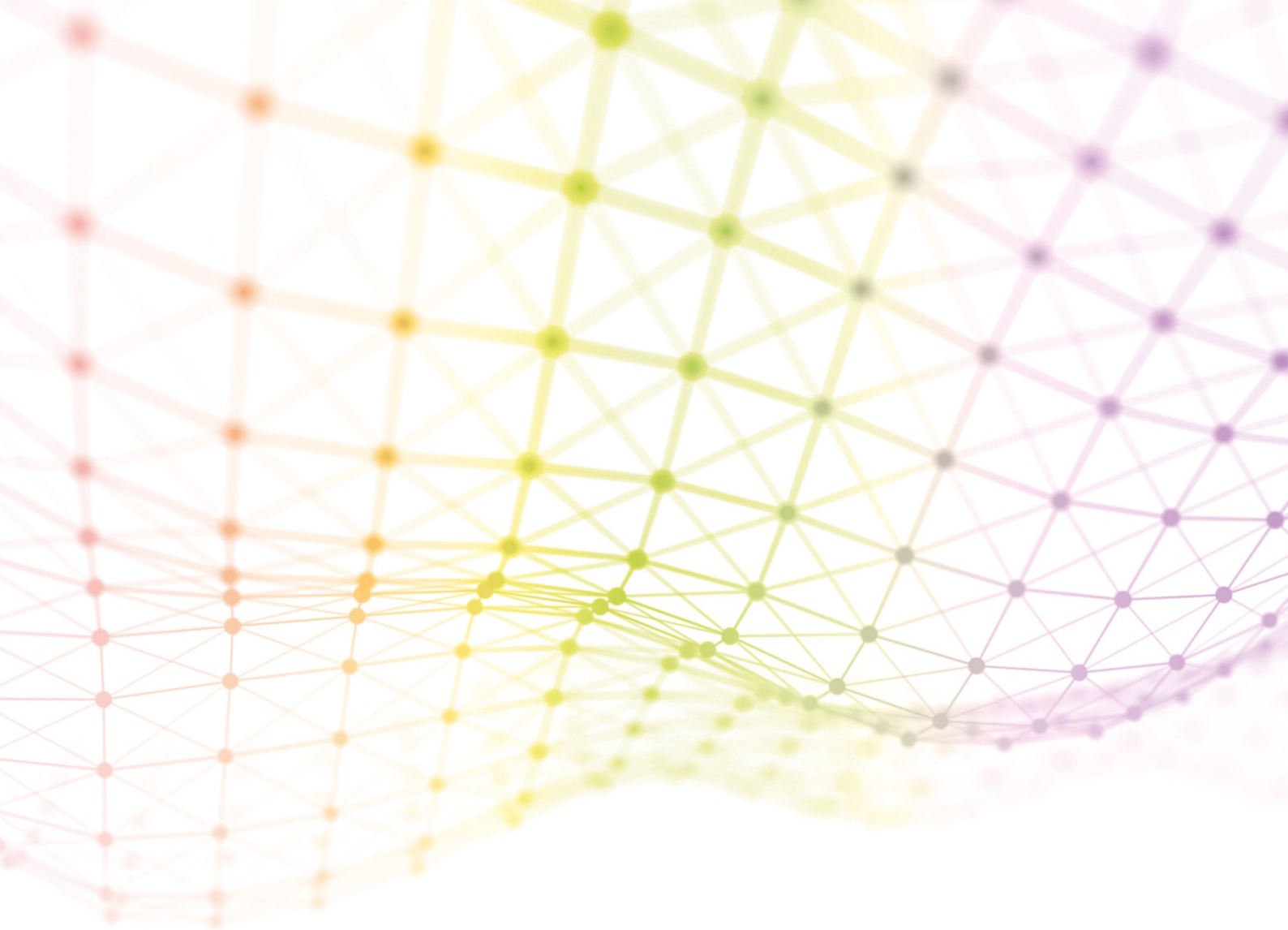
Form of intervention



Key challenges



Enablers/mitigations



University of Essex



University of
Southampton



Economic
and Social
Research Council

NCRM NATIONAL CENTRE FOR
RESEARCH METHODS

Office for
National Statistics

UCL

WARWICK
THE UNIVERSITY OF WARWICK

MANCHESTER
The University of Manchester

CITY
UNIVERSITY OF LONDON
UNIVERSITY OF LONDON

**National Centre
for Social Research**

LSE LONDON SCHOOL
OF ECONOMICS AND
POLITICAL SCIENCE

Uster University

Unil
UNIL | Université de Lausanne

Ipsos

verian
Formerly Kantar Public

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