

Standardized Procedures for Visitor Satisfaction Surveys at Corps of Engineer Projects

Effective 01 July 2004

Visitor satisfaction is expected to be one of four recreation performance measures used in the FY 2007 performance-based budget process for the Corps of Engineers Recreation Program. As part of this process, FY 2007 budget requests associated with some work packages must be supported by performance data on visitor satisfaction obtained using a standardized survey process. The tools and procedures presented here were developed to assist project personnel in planning and executing these surveys.

Using these tools and procedures, project personnel will be able to generate a sampling plan and execute a survey that will provide a project-wide characterization of visitor satisfaction during designated high-use months. The survey will include a probability draw of 20 sampling periods specifying the recreation areas and days on which sampling will take place. For each sampling period, a sample of eight completed comment cards will be obtained from recreation visitors. The total sample size for the survey will be 160 completed comment cards. Survey personnel will then be able to enter comment card responses into a database associated with Rec-BEST, and from there obtain a summary report of the survey results.

- [Survey Schedule Generator](#)
- [Survey Instruments: Acquiring Customer Comment Cards](#)
- [Survey Execution: Guidelines for Survey Personnel](#)
- [Online Data Entry](#) (*Available after 15 July 2004*)
- [Generating a Summary Report](#) (*Available after 01 September 2004*)
- [Have Questions or Need Help?](#)

Survey Schedule Generator

The mechanics of constructing a standardized visitor satisfaction survey plan and an associated sampling schedule have been automated in the Survey Schedule Generator, a program that uses a Microsoft Excel[®] user interface. If you have not used the Survey Schedule Generator before, you may find it helpful to review the Quick Facts below. When you are ready to develop a sampling schedule for your project, download and open the Survey Schedule Generator.

[Click here to download Survey Schedule Generator](#) -**Hint:** Right click on the link and select "Save Target As" to save the file onto your hard drive.

Quick Facts about developing a survey plan using the Survey Schedule Generator:

1. **What the Survey Schedule Generator does.** The Survey Schedule Generator will help you set up a sampling plan for a single recreation area, a few recreation areas, or all recreation areas on your project. For whatever list of areas you specify, the survey schedule generator will produce a sampling schedule for a survey plan that is suitable for characterizing satisfaction associated with the recreation areas you have specified.
2. **Time it will take to generate a survey schedule.** It should require no more than 30 minutes to generate a survey plan and an associated survey calendar. It may take a few minutes longer if you must first enable the macros in your installed version of Excel and install the Excel Analysis Toolpack, if it was not loaded during the original installation of Excel on your computer.
3. **Recreation areas to include in the survey.** You should include all Corps-managed recreation areas in the survey. Since total sampling effort will be the same regardless of how few or how many recreation areas you include in the survey, no reduction of effort will be realized by omitting recreation areas from the survey. However, it may not be desirable to include recreation areas that are closed during the survey period, receive very little recreation use, or would be logistically difficult to include in the survey. You may elect to omit these from the survey at your discretion.
4. **Months to survey.** You should select the two consecutive months of the year that you expect to receive the highest overall visitation. This is the period during which project facilities, services, and resources are most greatly challenged. This is the period we want to capture in the satisfaction survey.
5. **How the Survey Schedule Generator works.** The Survey Schedule Generator will identify a set of sample locations (recreation areas) and days on which visitor feedback via the comment card will be solicited from visitors. A sample of location by day sampling periods will be selected in proportion to expected visitation. As a

result, survey personnel will be directed to locations and days when visitation tends to be highest. For each sampling period, a sample of completed surveys will be obtained. Adherence to the sampling plan will generate an efficient, representative sample of visitors to Corps-managed recreation areas that is self-weighted for ease of computing satisfaction levels across the visitor population specified by the recreation areas and months of sampling.

6. **Information you will need.** The Survey Schedule Generator contains default recreation area information for those projects having at least one Corps-managed recreation area listed in OMBIL. The default data will simplify the development of a sampling plan by eliminating the need to assemble and enter the recreation-area data required to generate the sample schedule. However, you may be able to produce a better plan that will produce more applicable survey results if you can supply more appropriate data for the recreation areas. Therefore, you will have the opportunity to override the defaults and enter better information, if available. In the worksheet, you will specify:
 - Recreation areas you want to include in the survey.
 - Two consecutive months in which the survey will take place.
 - Expected visitation level during these months at each recreation area.
 - Percent day-by-day distribution of visitation across a typical week.
 - Amount of holiday visitation (if applicable) compared to a typical weekend day.

7. **Steps to generating a sample plan.** There are six short steps involved in generating and saving a sampling plan.

Step 1: From the pull-down menu, select the project you want to survey. This will populate the work area in step 3 with a list of Corps-managed recreation areas and associated default visitation statistics.

Step 2: From the pull-down menu, select the 2-month period you want to survey. This would ideally correspond to the two consecutive months receiving the highest monthly visitation.

Step 3: Identify recreation areas you want to include in the survey by following the instructions provided in the Survey Schedule Generator. Then add or change the visitation use and distribution statistics, as necessary, to accurately characterize visitation patterns on each recreation area.

Step 4: Click on “Generate Calendar.” This will generate a sampling schedule (see example below) with 20 sampling periods distributed over the areas and dates specified in steps 2 and 3.

The probability-based sample selections are drawn “with replacement.” This means that more than one recreation area can be selected for sampling on a single date as occurred on 7/11/2004 in this example. It also means that one recreation area can be selected more than once on a single day as occurred with “Rec Area A” on 7/3/2004. Sampling instructions for these situations are provided in the section “Guidelines for Survey Personnel,” subsection “How Many Samples.”

Comment Card Survey Calendar For:				
Lake Discovery				
<i>Scheduled Survey Date</i>	<i>Recreation Area</i>	<i>Actual Survey Date</i>	Completes	Refusals
7/1/2004	Rec Area A			
7/2/2004	Rec Area B			
7/2/2004	Rec Area C			
7/3/2004	Rec Area A			
7/3/2004	Rec Area A			
7/3/2004	Rec Area A			
7/4/2004	Rec Area E			
7/4/2004	Rec Area D			
7/4/2004	Rec Area C			
7/11/2004	Rec Area F			
7/11/2004	Rec Area A			
7/17/2004	Rec Area B			
7/18/2004	Rec Area G			
8/5/2004	Rec Area G			
8/12/2004	Rec Area B			
8/19/2004	Rec Area G			
8/21/2004	Rec Area G			
8/22/2004	Rec Area A			
8/27/2004	Rec Area G			
8/28/2004	Rec Area A			

- **Step 5:** Print the calendar. You will need to verify the locations and dates of sampling and to tally the number of refusals and completed comment cards each sample period.
- **Step 6:** Rename and save the Excel file to a location where you can find it later. You may need to print additional copies of the calendar at a later date for use during data collection and data entry.

Survey Instruments: Acquiring Customer Comment Cards

A supply of comment cards can be obtained in two ways.

- You can print them yourself using the electronic card images provided below. These survey forms have been authorized for use under the authority of OMB approval 0701-0001, which expires 30 November 2005. The image files use a high-resolution Adobe Acrobat Reader[®] format that is compatible with most personal computer printers.
 - [Comment Cards - Camera Ready \(For use in 2003-2005\)](#)
 - [Comment Cards - Camera Ready \(Spanish Version - For use in 2003-2005\)](#)
- Check with your procurement office for approved methods of obtaining printing services. If allowed under your procurement rules, you can have the cards printed by a commercial printing shop. Ace Printing and Blueprint Company, Vicksburg, Mississippi is one source for obtaining a supply of 5 x 6½-inch, OMB-approved comment cards. Ace Printing will accept telephone orders and payment via government credit card.

Contact Information: Ace Printing and Blueprint Co.
Attn: Ms Margaret Rose
P.O. Box 820552
Vicksburg, MS 39182-0255
Phone: 601-636-8503
Fax: 601-636-8523

Cost, excluding shipping:	400 cards	\$75.00
(In effect as of	800	\$91.00
07 June 2004)	1200	\$110.00
	2400	\$157.00
	3600	\$203.00

Notes:

1. If you will be conducting an FY2004-2005 visitor satisfaction survey to obtain performance data for use in the FY 2007 performance budgeting process, you will need approximately 200 comment cards to obtain 160 completed survey cards.

2. The comment card may be revised within the next year. We recommend that you purchase only the number you expect to use in the coming year.
3. Due to the significant discount for large quantities, you may wish to consolidate card purchases among several projects, when feasible.

Survey Execution: Guidelines for Survey Personnel

Materials and Supplies You Will Need in the Field

- Comment cards- enough to obtain eight completed comment cards each survey period.
- Pencils – so visitors can complete the comment card.
- Envelopes- one for each comment card (you can recycle these each sample day).
- Copy of survey calendar- to verify when / where to survey and to tally the number of refusals and completed surveys.
- Copy of “Guidelines for Survey Personnel”- instructions on field procedures.

When and Where to Sample

The sampling calendar you generated in the Survey Planning step identifies the places (recreation areas) and times (days) where comment card data will be collected in this survey. These places and times were selected proportional to expected visitation, based on the prior-year visitation amounts and distributions you reported in the Survey Planning step. As a result, places and times with heavier recreation use are more likely to appear in the sample. You can minimize the impact of the survey on project personnel by scheduling routine patrols to coincide with the sampling schedule.

How Many Samples

For the FY 2004 -2005 visitor satisfaction survey of a project, a total of 20 sampling periods (place x day designations) will be generated over a survey time frame of two months. You should obtain eight completed comment cards during each sampling period, a total of 160 completed comment cards for the survey.

Recreation areas on your project that have high visitation relative to other recreation areas may be selected for sampling more than once on the same day. Where this occurs, the calendar will list that recreation area two or more times for the same date. You should plan to administer a full complement of eight comment cards in connection with each sample selection. If, for example, a particular recreation area comes up for sampling twice on the same day, you should administer a total of 16 comment cards (8 x 2) at that location on the designated sample day.

How to Select Visitors for Sampling

Recreation areas can usually be classified into one of four types. The method of administering surveys to visitors will differ for each type of recreation area, as follows:

- **Campgrounds:** On the designated sampling day, check with the gate attendant to identify campers that are scheduled to leave the following day. Select and visit eight such campsites during the evening and obtain one completed survey from one individual present at each of the selected campsites.
- **Day-Use Areas:** Obtain eight completed surveys distributed over as much of the day as is practical. The survey should be administered to parties who show signs of leaving the recreation area. Approach visitors in the parking lot or at their recreation site as they are preparing to end their visit.
- **Recreation Areas that have Separate Camping and Day-Use Sections:** The eight surveys should be allocated proportional to anticipated camping and day-use departures. If the expected ratio of camping to day-use visitors on the designated sampling day is either unknown or known to be approximately 50:50, administer four surveys in the camping section as described above for “Campgrounds” and four surveys in the day-use section as described above for “Day-Use Areas.” If the expected ratio of camping to day-use departures is known to be different from 50:50, administer the surveys in proportion to expected departures.
- **Campgrounds That Allow Day-Use:** On the designated sampling day, administer surveys as described above for recreation areas that have separate camping and day-use sections. You will need to determine the status of potential survey recipients as day-users prior to administering the quota of day-use surveys.

Visitors are generally organized into parties that recreate as a group. In selecting visitors to survey, you usually select parties from which one member age 16 or older is surveyed. The selection of a member of the party to interview will often be determined by which member of the party steps forward in response to your request for assistance. Responses to satisfaction surveys are known to vary by visitor age, gender, ethnicity, and activity. Consequently, you should attempt to achieve a sample that is representative of visitors with respect to these characteristics.

Adjustments for Unforeseen Circumstances:

- **Short-term closure of recreation areas:** If the recreation area is closed on the scheduled sampling date because of high water or other short-term events, reschedule the survey for the same day of the week as soon as the area re-opens.
- **Rain days:** The need to reschedule a survey due to adverse weather conditions would typically apply only to day-use visitors. If adverse weather conditions keep all or nearly all visitors from using the recreation area on the designated sampling day, then reschedule the survey for that recreation area as follows:
 - If the survey was originally scheduled for a weekday, then reschedule it for the next available weekday.
 - If the survey was originally scheduled for a weekend day, then reschedule to the next available weekend day.

- **Inability to fill daily quota:** If there are too few visitors available on the scheduled sampling day to obtain eight completed surveys, then fill out the remainder of the quota on the next available day as described above under “Rain Days.”
- **Other unforeseen circumstances:** Contact ERDC for help. See the section “Have Questions or Need Help” for contact information.

Interacting with Visitors

- **Do this.** Hand the visitor a comment card, pencil and envelope. Ask the visitor to complete the card, insert it into the envelope, and then hand it back you. In the process of administering the survey, you may encounter visitors who are reluctant to mark satisfaction items they would rate unfavorably. You should encourage candid responses to all questionnaire items.
- **Not this.** Please do not leave the comment card with the visitor with instructions to drop it off later at a designated location. The response rate for this method of administering the comment card can be very low.

Data You Need to Record

The printed copy of the survey schedule has columns labeled “Actual Survey Date” “Completes” and “Refusals”. In these columns you should record the date the survey actually took place, the number of surveys completed (usually eight) and the number of refusals encountered during the sampling period. The survey clerk should record appropriate values at the end of each survey period. This is the only data that the survey clerk must record. It will be requested during data entry. All other data will be recorded by the visitor on the customer comment card.

Online Data Entry

All visitor satisfaction data collected during the July 2004 – April 2005 survey period that is intended for use in the FY 2007 budget process must be entered into Rec-BEST by 01 May 2005.

You can enter comment card survey data for a project:

- At the end of the survey, all at one time.
- Periodically, after completing one or more sampling periods.

To access the comment card data entry program, go to the [Rec-BEST website](#), log in, and then select Visitor Satisfaction Data Entry.

Note: The data entry system will not be operational until July 15, 2004. While you may enter data prior to July 15, 2004, it will not be retained by Rec-BEST. Any data entered prior to July 15, 2004 must be entered again after this date.

Generating a Summary Report

An on-line procedure for obtaining a summary report from comment card data entered in Rec-BEST is under development. Check back after 01 September 04.

Have Questions or Need Help?

Point of Contact: These tools and procedures were developed by Richard Kasul, Wen Chang, and Sam Franco. If you need assistance, please call Mr. Franco at 601-634-4205 or e-mail him at Sammy.F.Franco@erdc.usace.army.mil.