

HUD CDBG Income Survey Toolkit

Conducting Local Income Surveys in the Community Development Block Grant (CDBG) Program

User Guide: Qualtrics Survey Instrument

Note: Refer to Appendix A in the CDBG Income Survey Guidebook for approximate costs for this data collection method.

1. Introduction

This user guide supplements the Guidebook: *Conducting Local Income Surveys in the Community Development Block Grant Program* and provides one option for a data collection tool. For more information refer to the Guidebook and the [Community Development Block Grant \(CDBG\) Income Survey Toolkit](#) (Toolkit).

Qualtrics is a web-based data collection and analysis program that is designed to collect data directly from respondents through a web-based form. The form can be used for families to enter information directly and is suitable for in-person and telephone surveys.

This guide provides step-by-step instructions for using a preprogrammed Qualtrics survey template to capture income in a local area. You must have a paid subscription to Qualtrics to use the survey.

2. Preparing to Use Qualtrics

Once you have a Qualtrics subscription, the first step is to log into the account and import the Qualtrics survey template provided in the Toolkit.

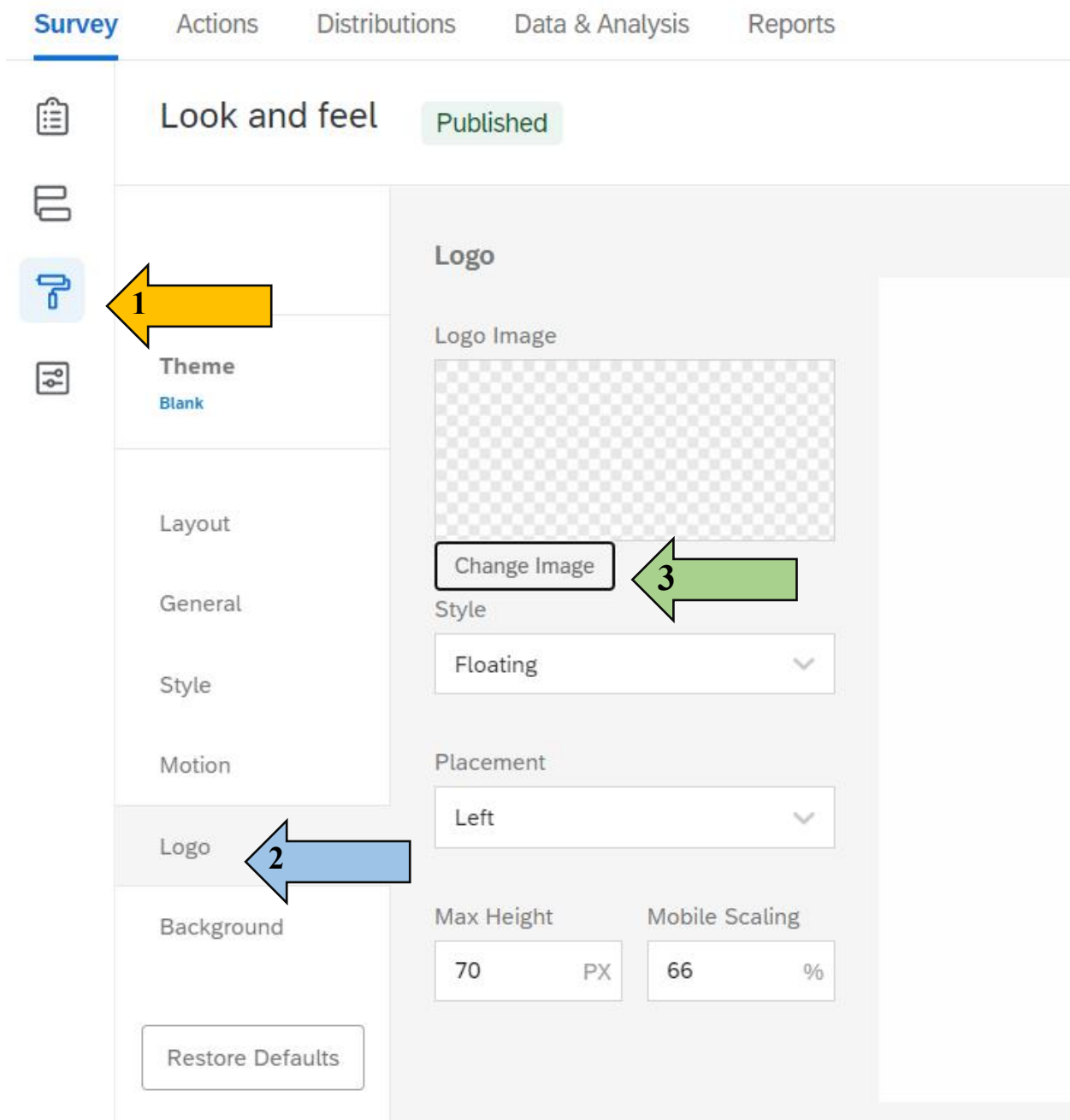
- First, download the survey [template](#).
- Log into Qualtrics: <https://login.qualtrics.com/login>.
- Choose “Create New Project.”
- Under “From Scratch,” choose “Survey,” then choose “Get Started.”
- Click the drop-down box under “How do you want to start your survey” and choose “Import a QSF file.”
- Select “Choose File” and navigate to the location on your computer or network where you saved the survey template. Select the file, which will end in “.qsf.”
- Give the project a new name under “Name.”
- Click “Get Started” on the right side of the screen.

The next page in Qualtrics is the survey design and editing view where you will be able to modify the survey questions and embed new income limit data for your local area, which will be covered in more detail in the next section. The template is preloaded with standard text that can be customized for local needs. For example, you can use the introductory text to mention your city/town name and supply some details about the specific goals of the project for which the data are being collected. You can also embed a municipal logo in the survey, which may enhance the perceived legitimacy to your intended respondents.

- Edit the text of survey questions by adding the name of your city/town and other relevant details. Make sure to add your city/town’s name to the introductory text in Q1 and conclusion text in Q23–Q26 (the final question number may vary to skip patterns). To edit the questions, click on the relevant text box.
- You may also edit or remove any of the optional questions and add new questions if the preprogrammed ones do not fully meet the needs of your project. **Note:** If you change the structure of the survey, you may not be able to use the Microsoft Excel tool to calculate the results for your area.
 - o To remove a question, click on the red circle with a minus sign after hovering your cursor over the question.
 - o To add a question, click the green circle with a plus sign at the point in the survey where you would like the question to appear.
- To add a personalized logo to the survey,
 - a. Click the “Look and feel” tab at the left of the page (1. Paint Roller Icon).
 - b. Select “Logo.”
 - c. Click “Change Image.”

You will then be prompted to upload an image file to your Qualtrics library (Figure 1).

Figure 1. Uploading a Personalized Logo to Qualtrics



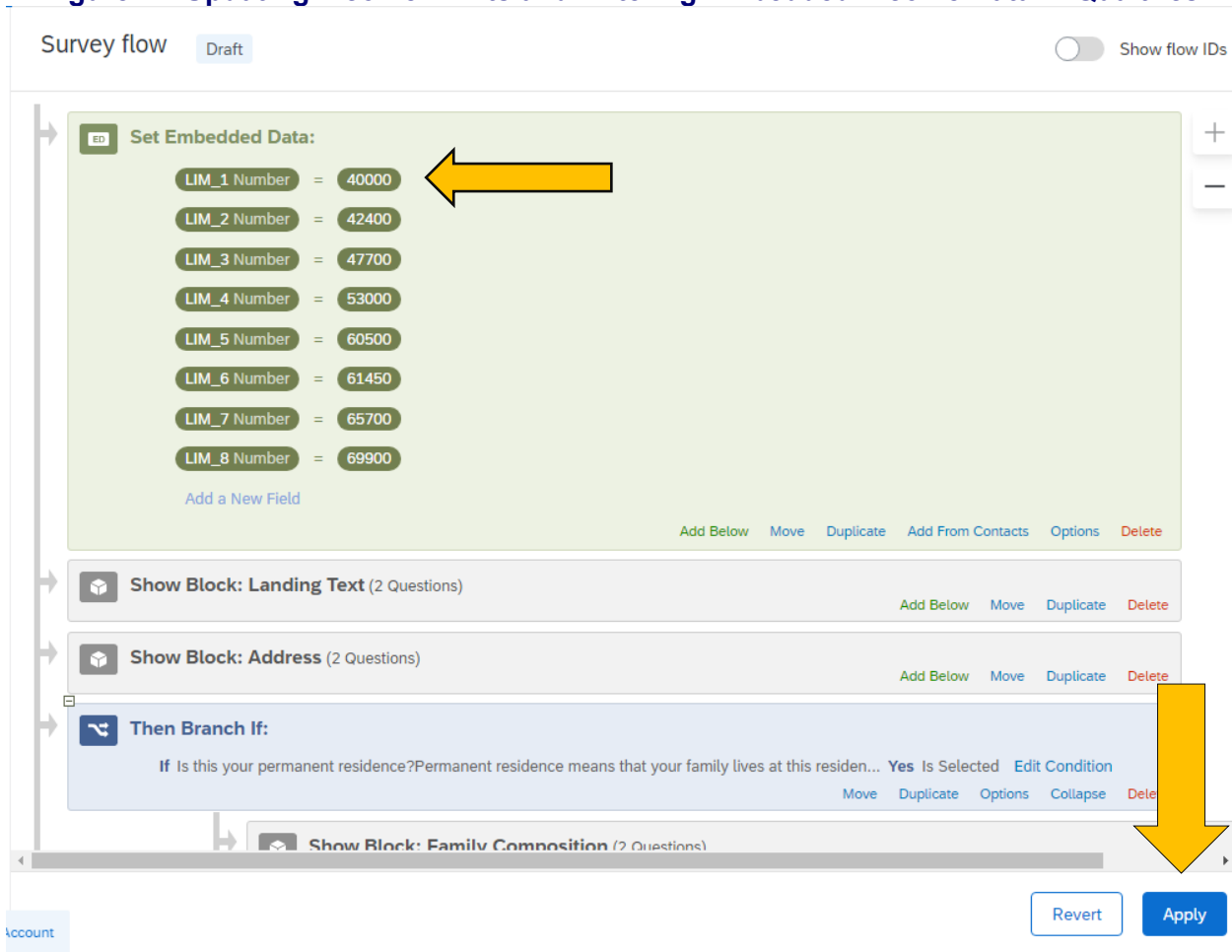
3. Update the Income Limit Data for the Local Area

After creating the new survey from the template, the next critical step is to update the embedded data to reflect the low- and moderate-income limits for your area. **Any data in the survey template must be replaced with the income limits for your area.**

- To update the embedded income data:
 - Use the current income limits from [HUD Exchange](#).

- o Click on the “Survey Flow” button on the left of the page.
- o On the survey flow page, add your local income thresholds for family sizes of up to eight. To edit the income limit values, click on the number, and enter the new value **without commas or a dollar sign**.
 - Values for families of nine or more will be calculated automatically.
- o Enter the value for each family size, from “LIM_1” for a one-person family to “LIM_8” for an eight-person family.
- After updating the embedded income values, click on the “Apply” button to return to the survey page.

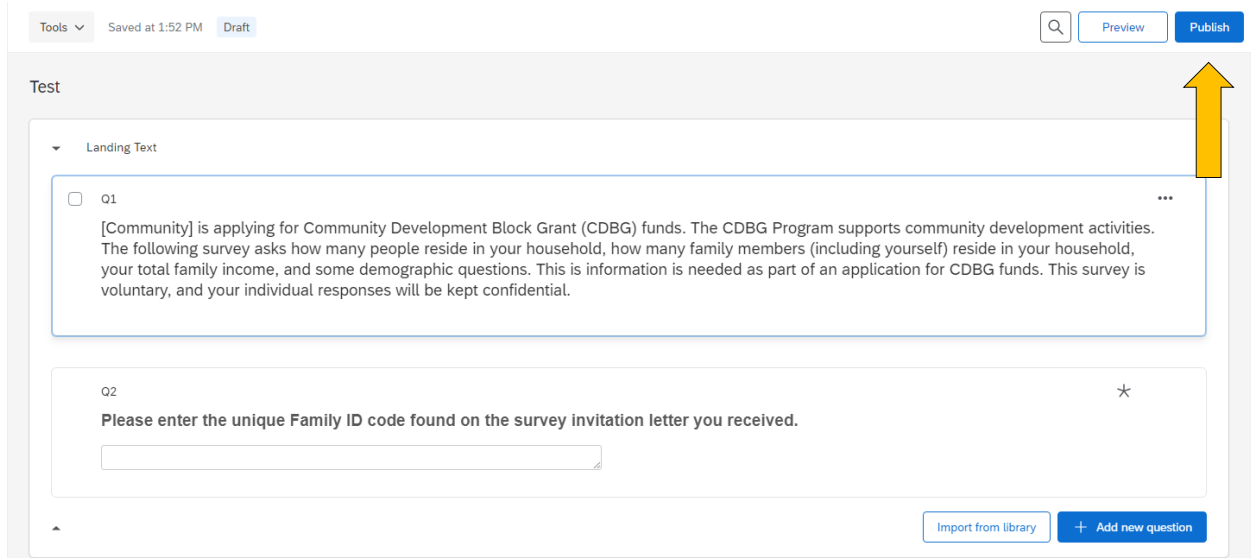
Figure 2. Updating Income Limits and Entering Embedded Income Data in Qualtrics



4. Prepare for Data Collection

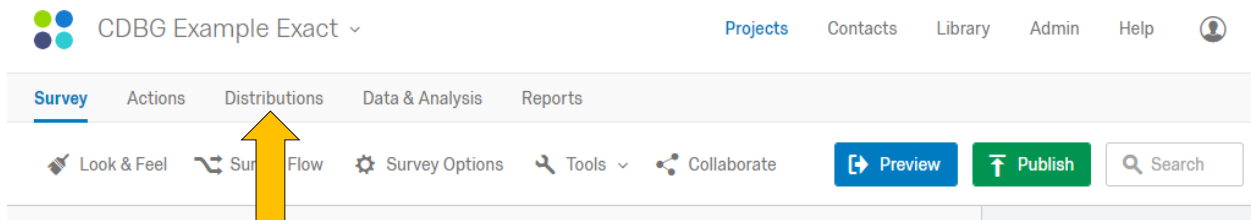
- Once the survey design is finalized, click “Publish” at the top right of the main survey builder page (Figure 3). This makes the survey “live” and ready for data collection.

Figure 3. Publishing the Survey



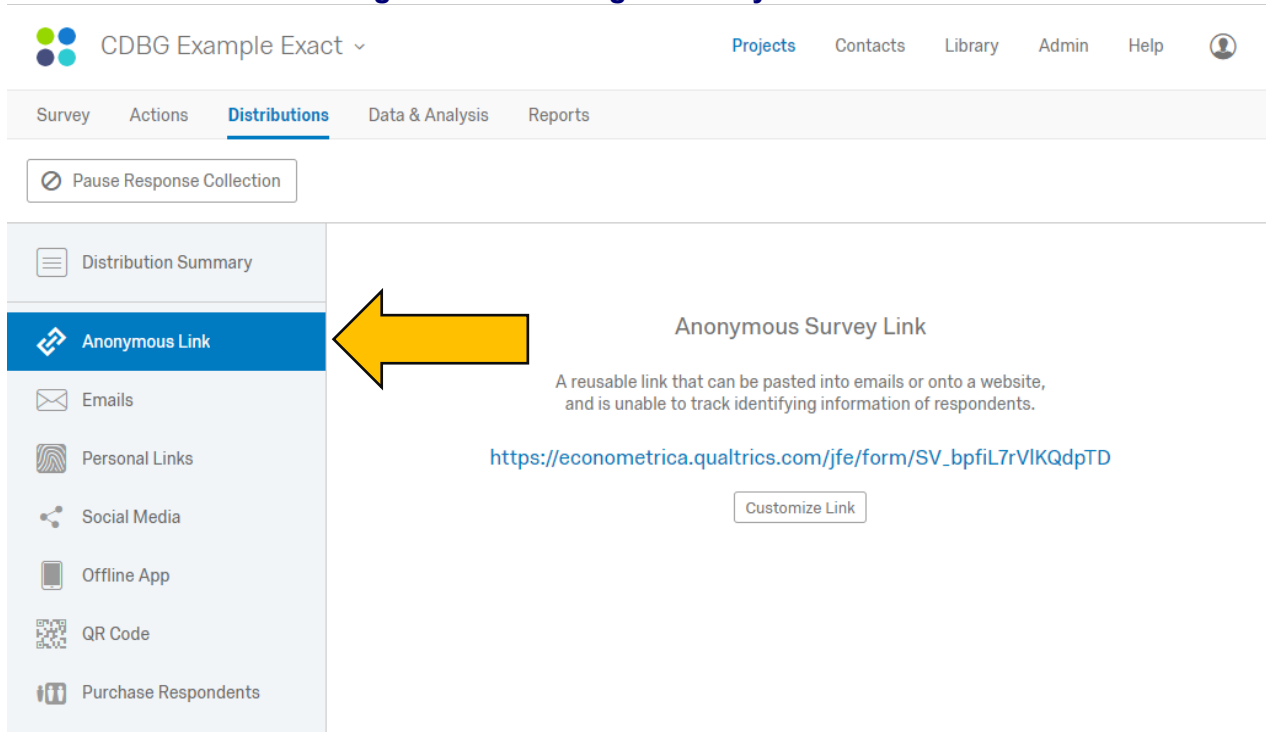
- To start collecting data, click on the “Distributions” tab (Figure 4). Qualtrics allows for several methods of data collection.

Figure 4. Collecting Data



- We recommend using an anonymous link to collect the data (Figure 5). Qualtrics generates a single, unique link that can be copied and pasted into invitation emails (or hardcopy letter.)
- Alternatively, you can select the “Personal Links” option for survey distribution. This option generates unique link for each sampled household.
 - This option requires you to create a contact list within Qualtrics that includes all sampled households. The fastest way to do this is to import the list of selected households from an existing spreadsheet (e.g., Excel).
 - The customized links can then be copied and pasted into an email invitation. You must be careful to match the unique link to the correct household when distributing surveys using this method.

Figure 5. Choosing an Anonymous Link



5. Data Collection

- After receiving an email, respondents can access the survey through the provided link, whether it is a common link for all respondents or a personalized one unique to that household. The link will open to the survey landing page.
 - The first few screens are for required information, such as the family's address, household composition, and income.
 - The survey template, as designed, asks respondents to type in their address. This information can be later cross-referenced with the address information in the sampling frame.
 - If a respondent skips the income question, a simplified follow-up question is presented that asks for the household income relative to the family size-adjusted income limit. Some respondents may be more comfortable answering this Yes/No question than providing their exact income.
 - Note that the value shown for the income question is dependent on correctly inputting the local income limits as embedded data (Step 3 above) and the number of family members entered on the previous page. It is also dependent on the respondent disclosing the size of their family in a preceding question.
 - The template survey includes a block of optional demographic questions. These questions may be skipped by respondents or removed from the survey by the survey administrator.

- o The survey concludes with a note that each family within a household should fill in a separate survey. This note is not presented in cases where the responses indicate a single-family household.
- To track the progress of data collection, return to the Qualtrics survey page and click on “Data & Analysis” to view the stored data.

6. Extracting Data From Qualtrics

- To export the data, navigate to the “Data & Analysis” page. Click on the “Export & Import” button, then select “Export Data.”
- Choose the option “Use numeric values” in the export popup. (Numeric values are required for the Excel Analysis tool to work properly.)
- When prompted to select the format for the data, select CSV and click the “Download” button.
- If you need to do any data cleaning, it must be done before adding the data to the Excel Tool in the next step.

Figure 6. Extracting Data from Qualtrics

The screenshot shows the Qualtrics interface for a survey titled "CDBG Example Exact". The user is on the "Data & Analysis" page. A yellow arrow points to the "Export & Import" button in the top right of the data table area. The dropdown menu is open, showing options: "Export Data...", "Import Data...", and "Manage Previous Downloads...".

| Recorded Date | Q1 - Household ID | Q2 - Family ID | Q3 - Hispanic or Latino? | Actions |
|-----------------------|-------------------|----------------|--------------------------|---------|
| Jul 24, 2018 12:47 PM | 123 | 123 | | ⌵ |
| Jul 24, 2018 11:47 AM | 123 | 123 | | ⌵ |
| Jul 11, 2018 12:45 PM | 1234 | 1234 | Not Hispanic or Latino | ⌵ |
| Jul 10, 2018 2:34 PM | 123 | 123 | Not Hispanic or Latino | ⌵ |
| Jul 10, 2018 2:28 PM | 2 | 2 | Not Hispanic or Latino | ⌵ |
| Jul 10, 2018 2:28 PM | 1 | 1 | Not Hispanic or Latino | ⌵ |

7. Analysis Using the Excel Tool

Open the Excel Tool: [Qualtrics Data Entry Tool](#).

- Review the “Instructions” sheet of the tool.
- Open the file with the saved Qualtrics data in Excel and select the entire sheet by clicking any cell and pressing Ctrl + A. Copy the data to your clipboard by clicking Ctrl + C or pressing the Copy button in the Excel tools ribbon.
- Paste the data into the “Qualtrics Input” sheet. Click the top-left cell of the sheet (“A1”), then paste the data from your clipboard using Ctrl + V or the Paste button in the Excel tools ribbon.
- The formulas will run automatically.
- Add the required information in the “Reference” sheet.
- Results will be generated in the “Report” sheet, which you can print by clicking the printer symbol (displayed at right). The report will output as a PDF file.

