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# GETTING STARTED WITH MARKET RESEARCH FOR OUT-OF-SCHOOL TIME PLANNING: A Resource Guide for Communities



PUBLISHED BY  
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This manual was funded by The Wallace Foundation, whose mission is to enable institutions to expand learning and enrichment opportunities for all people. The information herein was primarily authored by Julianne Pokela, Ph.D. and Ingrid Steblea with Jeffrey Steblea, Linda Shea, and Elizabeth Denny, Ph.D of Market Street Research, Inc., a nationwide provider of premium-quality, customized qualitative and quantitative marketing research and in-depth analysis services. Market Street Research has been serving the healthcare, financial services, consumer products, human services and other industries for almost 30 years. Market Street Research has been surveying parents and kids for many years about a wide variety of issues, and has done extensive marketing research relating to OST in recent years, including in Providence, RI, Washington, D.C., and Boston, MA. This research has been conducted with a variety of stakeholders, including parents, students, teachers, school administrators, OST providers, and community leaders.

Workbook A, Creating A Communications Plan, was primarily authored by **causemedia**, a comprehensive advertising agency. **causemedia** has been developing strategic awareness campaigns for socially-conscious companies and non-profit organizations since 1997.

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# PREFACE

There is growing recognition that the hours after school can be a time of risk for unsupervised children and youth. The hours between 3-6 p.m. are the peak hours for youth to commit crimes, be victims of crimes, be in or cause a car crash, smoke, drink, use drugs, or engage in other risky behavior.

But we do not think as often about a second, less visible kind of risk: This is the risk that children, particularly the disadvantaged, miss important benefits they might gain in those hours—benefits like learning, healthy development through sports, forging relationships with caring adults, or just having fun in a safe environment—and, instead, spend the time in boredom.

Fortunately, children can get those benefits by participating in quality out-of-school time programs. But benefits demand a certain level of participation. Children can't come just once or twice. They need to participate at meaningful levels. And there lies a challenge: participation by children at high levels is difficult to achieve. An authoritative RAND study commissioned by Wallace, *Making Out-of-School-Time Matter*, concluded that in many programs participation is low.

So how do we support participation? One way is to offer kids and parents what they want and need. A Public Agenda national survey, *All Work and No Play*, found that parents and kids want access to both academic help and enrichment activities that build teamwork, expand horizons, and teach new skills.

This national data is useful in understanding participation on the “big-picture” level. But there may be times when what really matters is local data—whether to inform the design of program offerings by better understanding the needs of specific groups, to help build a coalition for out-of-school time, or to develop information that can help drive community planning.

The Wallace Foundation is currently working with five city partners—Boston, Chicago, New York City, Providence and Washington, D.C.—to build more effective citywide systems to support high-quality out-of-school time. In their planning, these cities have used market research to provide the local knowledge that can help city leaders and providers build meaningful levels of participation.

Based on their experience, we commissioned the development of this guide to help other cities, providers and agencies develop market research that will give them the credible answers that they need to make progress in improving participation in quality out-of-school time programs. Though this manual—and its associated supplements—were designed with out-of-school time programs in mind, we think its lessons could apply to a range of social services, from early education to elder care.

We hope you will let us know whether you find it useful and how it might be improved. We also hope you'll watch for our upcoming publication that takes a more in-depth look at how market research was used to inform out-of-school time decisions in Boston, Washington D.C. and Providence.

And we urge you to take advantage of other publications, such as the ones mentioned above, available without charge on The Wallace Foundation's website, [www.wallacefoundation.org](http://www.wallacefoundation.org).



M. Christine DeVita, President  
The Wallace Foundation

This publication is an overview of what market research is, why communities might want to conduct market research, and when, where, and how to incorporate market research to support decisions about OST programs. Our intent in this section is to show how communities have used market research to shape strategies for OST programs so they meet the expressed needs of children, youth, and families.

It is accompanied by a series of companion workbooks available separately on The Wallace Foundation website (<http://www.wallacefoundation.org/WF/KnowledgeCenter/KnowledgeTopics/Out-Of-SchoolLearning/msr.htm>) that explain how to conduct a variety of market research methodologies. There are a total of nine workbooks included in this guide:

- Workbook A: Creating a Communications Plan
- Workbook B: Conducting Secondary Research
- Workbook C: Conducting Utilization Research
- Workbook D: Conducting Focus Groups
- Workbook E: Conducting In-depth Interviews
- Workbook F: Conducting Telephone Surveys
- Workbook G: Conducting In-person Interviews
- Workbook H: Conducting Self-administered Interviews
- Workbook I: Analyzing Quantitative Data

# INTRODUCTION TO THIS RESOURCE GUIDE

This book is a practical guide to show communities how to use market research within the context of planning for out-of-school time (OST) programs for children in grades K through 12. Market research provides a structured, deliberate way of obtaining information to guide important decisions. Market research can replace assumptions and guesses with fact; it gives kids in your community and their parents a voice with which to tell you their needs; and it will empower you with specific, concrete information for stakeholders to get their buy-in and support for your community's OST needs.

The purpose of market research in this case is to help groups invest in high-quality OST programming that kids want, parents trust, is safe and sustainable over time, and will benefit not only kids but also their families, neighborhoods, and the community as a whole. Information about children, families, schools, and neighborhoods can help communities get excited about OST programs so they will support efforts to create, enhance, and fund them, and move from planning to solutions.

This guide is intended primarily for policymakers who wish to support communities or who are directly funding OST programs, and for communities actively engaged with OST programming seeking practical, step-by-step information on how they can conduct market research (either by outsourcing all or components of the process, or conducting research using internal resources) to enhance the quality of their OST programming.

## INFORMATION INCLUDED IN THE WORKBOOKS

Each of the nine workbooks will provide much more detailed information about the principles and strategies discussed in this section. In each of the workbooks, you will find:

- **An overview of the research method**, including a brief explanation of the research method, a list of the steps involved in conducting this type of research, the practical advantages and disadvantages of this type of research compared with alternative methods, and questions to ask yourself to determine whether your community should outsource the research to a vendor or conduct the research using internal resources. We also present informa-

## HOW ARE WE DEFINING OST PROGRAMMING?

“Broadly speaking, ‘out-of-school time’ refers to how communities engage and support children and youth when they are not in school. At best, programs and activities operate on youth development principles and adhere to the conviction that youth are present as well as future assets. . . . Creative out of school time programs, activities and supports can protect children, engage them in productive activities, develop and hone competencies, encourage school attendance, provide peace of mind for parents and lead to healthier life trajectories. When a community develops a strong, sustainable out-of-school time system that supports the social, emotional and physical development of children and youth, it builds strong families and neighborhoods as well.”

*Out of School Time Matters: What Community Foundations Can Do* (Coalition of Community Foundations for Youth, September 2002)

tion about including area schools in your research planning process, where appropriate.

- **A guide to hiring vendors for communities that decide to outsource their research needs**, including information about what types of vendors to hire for this research, what to look for before you hire vendors, and where to find vendors. We also discuss what your expectations should be in terms of what your vendor will do, what will be required of you, and a range for what you might expect to pay.
- **A step-by-step guide for communities that decide to conduct research using internal resources**. The information provided in these sections will walk you through every step involved in conducting the specified research method. You will find explanations of terms, examples, checklists, pointers, and additional resources (such as websites) that may be useful to you. Whenever possible, we provide options for communities that have limited money and time for research as well as options for communities with more resources.

The workbooks are designed to be used independently; because of this, some information is included in more than one workbook. Throughout the manual we use the following symbol to indicate which workbook or workbooks will offer more detail or instruction on a topic:

**SEE WORKBOOK ?** : For more detailed information...

As part of this guide, we have included a CD of prototype materials: samples and worksheets that your community can adapt and use for its research needs. In addition, we interviewed people in communities that have engaged in planning and development of OST programs. These communities have provided us with important insights into what works and doesn't work in researching the market for OST programming. We have included sidebars with quotes and examples from people in these communities. These are titled "What Communities Have Learned".

#### WHO WILL FIND THIS MANUAL HELPFUL?

Our goal is to help people understand how to do market research within an overall context in which people work together toward a common outcome—high-quality OST programming kids will use. The techniques we offer can be adapted for use in a wide range of settings regardless of population size, demographics, or local economic conditions. We assume most users of this manual will be either:

- **POLICYMAKERS** on a national, regional, state, county, or municipal level who want to support communities or are directly funding OST programs; or,
- **COMMUNITIES** (coalitions, groups, OST providers, or intermediary organizations<sup>1</sup>) that are actively engaged with OST programming and want to know how best to conduct market research as a way of enhancing that programming.

If you are a national or state agency representative, a federal or state legislator or politician, or other policymaker, remember that the most successful OST programs—those that kids use and that produce the best outcomes for kids—are created at the local or neighborhood level. This guide, especially the overview, will

help you understand the challenges communities face in conducting market research, and what kinds of supports are most helpful. Use the workbooks as a resource if you become more involved in the nitty-gritty of OST market research.

If you are a community member, this book will walk you through the steps needed to do OST-related market research. Begin by reading this overview carefully, as it lays out a market research program we find works well in many diverse situations. The subsequent workbooks provide detailed instruction about how to research the demand for OST activities in your area, and how to communicate market research results to generate excitement and energy around OST programs in your community.

#### LEVEL OF EXPERIENCE WITH MARKET RESEARCH

This manual is designed for readers who want practical guidance about using market research within the context of community-based OST planning. If you are an experienced researcher, you will find that the manual omits the in-depth, theoretical discussions presented in academic journals or textbooks. The statistical methods we describe in the workbook on quantitative methods,

for example, are straightforward techniques that we find are understandable to lay audiences. These techniques can be used effectively by people with basic math skills and readily-available spreadsheet software. Experienced researchers may find the manual to

be helpful in explaining concepts to community groups that do not have much market research experience, however, and you should feel free to use parts or all of the manual for this purpose.

On the other hand, readers or groups that have never participated in a planning effort that involves market research, or who lack confidence or skills in basic math or computers, may find some of the information we present to be too detailed or intimidating. Our advice is *not to give up* if some aspect of your market research seems overwhelming—instead, try to find someone who can help you work through the details. Good resources include faculty at local colleges or universities, people who have used market research in business settings, or paid consultants.

#### ⇨ POINTER

Your community will not need to conduct every type of market research we discuss in this guide. This guide will help you understand what your research questions are, which research method will help you answer these questions, and how to conduct that type of market research.

# FUNDAMENTALS: RESEARCH DRIVES DECISIONS

## WHAT IS MARKET RESEARCH?

We believe communities need a deliberate, thoughtful process for making decisions about OST programs. Market research provides the data needed to make such support possible. Market research means collecting, analyzing, and using information to make decisions, in this case about OST programs. Market research is used in all kinds of settings—by businesses, nonprofit agencies, schools, health care providers, government organizations, political campaigns, and community groups seeking to invest in high-quality OST programming for kids.

### ⇨ POINTER

The use of market research to help cities planning their OST initiatives is a fairly new strategy at this time. Several cities have employed this technique and have found it to be beneficial.

In this section, we will overview some of the benefits of using market research for OST planning. We will conclude with comments from communities that have conducted market research as part of their OST initiatives about how they believe their planning benefited from the research they conducted.

## WHY CONDUCT MARKET RESEARCH?

There are clear advantages to collecting data about your community before deciding what kinds of OST programs will best meet kids' needs. Market research can tell you who needs OST programs or is most likely to use these programs if they are offered; what kinds of programs are likely to be most successful in terms of meeting kids' and parents' needs; what barriers might prevent kids from using OST programs, such as affordability, lack of transportation, perceptions about quality, and so forth; and what programs already exist in your community.

Market research helps by focusing people's attention on the facts about a community rather than on people's assumptions. Decisions about OST programs are frequently guided by people's instincts and so-called "common knowledge" about a community's characteristics and needs. Even if people's initial thoughts about OST programming are correct, in the absence of solid data it can be difficult to justify decisions about new programs or changes to existing programs.

Market research is an essential tool for communities to use in figuring out what kinds of OST programs will

both attract kids and keep kids coming. Participation in OST programs tends to be voluntary. Kids "vote with their feet" when it comes to the kinds of activities they will participate in when not in school. If the activity is enjoyable and worthwhile, they will participate, unless factors beyond their control (such as lack of parental approval, lack of OST options, problems with transportation, or affordability, to name a few examples) prevent them from doing so. Parents can also have a strong influence on kids' OST activities, particularly those of younger children.

Market research can help you understand why existing OST programs are underutilized and what can be done to increase

participation.<sup>2</sup> There is increasing evidence that the perceived *quality* of OST programs—what kids and parents think about local options—affects whether or not kids will participate. Several recent national surveys suggest that both kids and parents recognize the value of high-quality, fun, safe, and adult-supervised OST programs and kids want to participate in these kinds of activities, but that they often have trouble finding local options that meet their needs.<sup>3</sup>

Finally, market research serves an important role in generating feedback from participants and other stakeholders as OST programming is created or enhanced in a community. Groups often need to make mid-course corrections during their OST initiative; for example, they may want to get kids' reactions to new ideas or programs so that they can be fine-tuned before additional resources are invested. Market research can also help communities respond to changes in kids' demographic characteristics, economic circumstances, interests, or needs, thus helping to maintain the quality and appeal of OST programming over time.

Market research means listening to what kids and families want, and actively using this information throughout OST planning efforts.

## WHY DO MARKET RESEARCH?

- Better use of resources (time, money)
- Ability to inform and fine-tune OST strategies based on facts
- Raise awareness of kids' and parents' needs and preferences regarding OST
- Ability to get “buy-in” on decisions from important stakeholders, such as schools, parents, and community leaders
- Greater ability to pursue good ideas
- Ability to change OST programs when needed, or eliminate unwanted programs
- Better chance of influencing public policy
- Solid justification for grants and funding

## WHAT IS THE GOAL?

OST activities that kids want, parents trust, are safe and sustainable, and will benefit the community

## HOW HAS MARKET RESEARCH HELPED THESE COMMUNITIES?

### **Market research helped stakeholders make decisions about OST programming in Chicago.**

“We’ve been able to make recommendations to the OST program about how they should change what they’re doing. An example is that the program was initially only 10 weeks per semester and we thought that kids needed to go to after-school programs all the time: the research showed that when kids were attending their programs, they were more likely to come to school. So now they’re thinking about extending the after-school programs, making them longer.”

— *Bob Goerge, Chapin Hall Center for Children. Conducted a multi-phase research project, including self-administered surveys of high school students in Chicago, in-depth interviews with students, and an inventory of OST programs in Chicago. The objective of this research was to better understand participation in OST programs and other activities among Chicago youth, as well as the effects of established programs.*

### **Market research also helped Chicago organizations understand how to market their OST activities.**

“In the beginning, we thought that kids who wanted to participate in the OST programs wanted to have contact with another adult, but during the research kids never stated that’s the case: In most cases they want to be with their friends. That’s changed how people think about OST programs. If you want kids to go to OST programs and get some of the benefits, you have to show them that it’s fun. There’s been a recognition of that since we did our research.”

— *Bob Goerge, Chapin Hall Center for Children*

### **Market research helped organizations obtain funding for OST programming in Little Rock.**

“I’m pleased about the fact that OST, through this initiative, is continuing to be something that is being looked at for expansion both locally and at the state-wide level. If and when the state legislature meets at a session in the next few years, and passes legislation that puts \$40 million a year into after-school opportunities for kids across the state . . . we can look back on that and say [our research] was really a starting-out point to really pay some close attention to OST and figure out how we might get it done.”

— *Mark Perry, New Futures for Youth. Conducted a mail survey of community organizations offering OST activities in and around Little Rock. The research project was designed to provide information on OST activities to city partners and area schools districts and engage them in the initiative to expand OST activities, especially for middle-school students.*

### **Market research gave New York City stakeholders buy-in and a common frame of reference.**

“Data collection and analysis are essential to make the case for OST. Using data changed the discussion from ‘What is the problem?’ to ‘How are we going to address it?’ The data gave everyone a common frame of reference so we could focus our efforts on defining priorities and figuring out strategies for change.”

— *Mary McCormick, Fund for the City of New York. Conducted secondary research and utilization research of OST programs operating in New York City. This research project was designed to inventory existing OST programs and enrollment measures in order to direct resources to underserved and high-need areas.*

## WHEN SHOULD MARKET RESEARCH BE DONE?

The easy answer to this question is, “at the very beginning of our community’s investigation of OST needs, and repeat as necessary.” As a general principle, decisions are always better if informed by accurate, timely information—but realistically, communities may not have the money, resources, or skills to conduct the research they might want to conduct at the ideal points in time. Market research can be done at any point during your OST planning process, and there are several points at which market research tends to be particularly useful to groups:

- Before making any decisions about OST programming.
- At mid-course after some decisions have been made (such as which age groups the OST programs will be oriented toward, who the partners are likely to be in terms of funding and running the programs, etc.).
- When programs are operating, to fine-tune what is offered as well as on an ongoing basis, to assess satisfaction and the programs’ impact or effectiveness.

Try to figure out what information would be most useful to the group that is considering OST programs in your community, and when that information is likely to be most helpful. Your next task is to investigate how to obtain this information efficiently, what resources will be needed, and who should conduct the research—someone in the planning group, for example, or a volunteer with research expertise, or a paid consultant.

## WHAT KIND OF MARKET RESEARCH SHOULD WE DO?

Researchers use the term “methodology” to mean the methods or tools they use to gather information about

the demand for OST programs in a community. There are two major types of research: secondary research (also called “background research”), and primary research. Secondary research involves finding, analyzing, and using information that someone else has already collected, such as statistics from published reports, state agencies, or the U.S. Census Bureau, and primary research involves collecting, analyzing, and using new information or data that has not been gathered previously. In addition, research can either be quantitative (involving numeric data) or qualitative (non-numeric):

- **QUANTITATIVE RESEARCH:** Quantitative research means any tool or method that produces information from which you can generate percentages. A good example is a telephone survey in which a large number of parents are asked a question like, “Do your middle school-aged children participate in any after-school sports?” Once the survey is completed, parents’ answers are used to calculate what percentage of middle school-aged kids participate in sports. Telephone surveys, in-person interviews, self-administered surveys, and web-based surveys are all considered to be quantitative research methods.
- **QUALITATIVE RESEARCH:** Qualitative research, on the other hand, describes any tool or method that produces information that is hard to quantify (e.g., not suited to establishing rates or percentages). A good example would be interviewing a small number of carefully selected community leaders—such as the mayor, the head of the local school board, the superintendent of schools, the director of a social program serving low-income families in the area targeted for OST programs, etc.—about their impressions of the need for OST programs on a local level. Focus groups are another example of a qualitative research method.

MARKET RESEARCH METHODOLOGIES		
Primary Research		Secondary Research
<b>Qualitative Methods</b> <ul style="list-style-type: none"> <li>▪ Focus groups</li> <li>▪ In-depth interviews</li> </ul>	<b>Quantitative Methods</b> <ul style="list-style-type: none"> <li>▪ Telephone surveys</li> <li>▪ In-person surveys</li> <li>▪ Self-administered surveys</li> <li>▪ Web-based surveys</li> </ul>	Use of information already collected by someone else, such as the U.S. Census or published reports

## ADVANTAGES AND DISADVANTAGES OF SECONDARY RESEARCH

### Advantages:

- Timeframe—can be done quickly since many helpful sources are available at local libraries or are published on the web
- Can be collected by someone with limited research background or technical expertise
- Often free or low-cost
- Helpful for narrowing focus, generating hypotheses, or seeing if trends exist in a community

### Disadvantages:

- The information you want may not be available
- The information that is available may be out-of-date or may lack relevance to your community
- The quality of published information is not always acceptable
- Poor choice for understanding the attitudes and beliefs that may be driving a trend

## ADVANTAGES AND DISADVANTAGES OF PRIMARY RESEARCH

### Advantages:

- Information collected is directly relevant to your community
- Can be very specific or directed toward an important focus or issue
- Quality of information can be controlled and assured
- The information is likely to be more current

### Disadvantages:

- Timeframe – primary research (such as a survey) often requires weeks or months to complete
- Costs are typically higher
- The skills needed to collect and analyze primary research are specialized—you may need a consultant's help

# STEPS INVOLVED IN AN OST RESEARCH INITIATIVE

Below, we outline the major steps involved in an OST research initiative. In the next sections, we will explain more about each step shown here. In addition, the workbooks included in this manual provide detailed information about conducting each type of research methodology and developing a communications plan.

## 1. FORMING YOUR OST MARKET RESEARCH TASK FORCE

Create a small team with skills and decision-making authority that can engage the community at key points and also speak for the community as decisions are made about the market research.

## 2. BUILDING MULTI-SECTOR CONSTITUENCIES

Who are the important stakeholders in your community, and how can we engage them?

## 3. CONDUCTING BACKGROUND RESEARCH

What already exists in terms of OST programs, and what is the social and political climate in which we will begin the planning process? What gaps seem to exist? What questions do we need to ask about kids, families, and our community in order to plan for new OST alternatives? What information will help us answer these questions? What resources do we have at hand?

## 4. CONDUCTING PRIMARY MARKET RESEARCH

Collect and analyze the data you need that cannot be found through existing sources—for example, conduct focus groups; survey kids, parents, or community leaders; or do other primary market research to determine what types of kids OST programs should target in your community, what the demand for OST

programs is, and what kinds of OST alternatives are best given kids' needs and preferences. How many kids will the programs benefit and how? How will the community benefit?

## 5. USING THE RESULTS

The research results can be used to make decisions about OST programming. For example, what programs do the market research results suggest that the larger OST planning community should consider, and why? Do we need new programs, or enhancement of existing ones? What will we not recommend (or put off for the future) and why? How much will high-quality OST programs cost? Who should fund and operate the programs? What steps should we take to move forward? The research results can also be used to garner buy-in and support for OST programming from the larger community, as well as for obtaining funding for that programming.

## 6. IMPLEMENTING THE COMMUNICATIONS PLAN

How can we let stakeholders and constituencies know what the research says about OST programs, and get them excited about the ideas we've generated as a result of gathering high-quality information about kids' needs? How do we ensure that communications remains an integral part of our OST planning in the future?

## 1. FORMING YOUR OST MARKET RESEARCH TASK FORCE

Many times one person in a community takes the initiative to convene a group or coalition for the purpose of studying local OST possibilities. If you are that person, we recommend that you (or your group, if you have already come together to discuss OST programming) create a market research task force whose purpose is to identify what OST programs already exist in the community, to solicit feedback and ideas from important stakeholders, to obtain and analyze market information, and assist whatever groups or organizations that are engaged in OST programming in your community to understand and use this information for decision-making. You may want to give the task force a name with local relevance that engages people's attention, generates excitement about OST programming, and reflects your broader mission.

Once the task force has been established, one member should act as the leader whose role will be to lead meetings, keep the group on task, monitor the progress of those responsible for conducting the market research, and make sure results lead to action.

### WHAT SHOULD THE OST RESEARCH TASK FORCE LOOK LIKE?

- Keep the group small so decisions can be made quickly—four to six members is a good guideline for the task force, although your group's size may vary depending on the constituencies you invite to participate.
- Circle back to the larger community for feedback, ideas, support, and resources.
- Clearly establish roles before you start working on a plan for OST market research. If you are having trouble with process, consider hiring a consultant to help you run these meetings. The Task Force can include, for example:
  - A group leader with skills in planning, mediation, negotiation, etc.
  - A timekeeper who gently but firmly moves the discussions along
  - A person whose role is to communicate back and forth with key stakeholders who are not on the OST Research Task Force, but need to be informed and consulted
  - A person whose role is to record the group's decisions carefully and completely, so progress can be demonstrated and good ideas aren't lost

### ⇨ POINTER

Most importantly, keep it simple and avoid “meeting for the sake of meeting.” If you have to create numerous subcommittees and work groups, or if your OST Research Task Force grows larger with each iteration of the process, the Task Force is probably too large. You may also need to establish greater transparency and trust with other key stakeholders—or change who is on the Task Force—so decisions can be made with authority and timeliness. Having a clear reporting structure (and timeline) for gathering certain pieces of information will also help you avoid meeting for the sake of meeting.

- A person who is knowledgeable about families in your community and can speak accurately and compassionately on behalf of parents and kids
- A person with connections to possible funding or other resources in your community that might be used for OST programs

### WHO SHOULD BE ON THE OST RESEARCH TASK FORCE?

- People who have the time and energy to participate in the design and implementation of a market research project, who can participate through the whole process, and who have the authority to make decisions about aspects of the research that need stakeholder input without having to garner permission from others.
- Representatives from a variety of sectors (e.g., education, business, nonprofit, government, families).
- People with as many relevant skills as possible (e.g., leadership, enthusiasm, access to resources, expertise in program development, expertise with children or education, good business sense, access to media, and so forth).
- A prominent, well-known, respected community leader who believes in OST programs and can champion the cause to important constituencies, such as potential funders at the state or federal level and critical supporters at the local level (examples might be school superintendents or elected officials).

## 2. BUILDING MULTI-SECTOR CONSTITUENCIES

In our experience, market research is most effective if key audiences or “stakeholders” who are interested or involved in OST programming in your community are

engaged in the research process from the beginning (see page 12 for a list of the types of people who may be stakeholders in your community). Involving stakeholders builds trust in the research process; allows for shared responsibility for decisions and actions; creates programs more likely to be adopted; leads to better, more cost-effective programs; and allows for better coordination of resources.

In addition, by engaging the participation of key stakeholders you are creating a team of advocates for the programs you ultimately invest in. These individuals can be used to address community forums, to be quoted in articles in the media, to host one-on-one meetings with other potential influencers, and to help create and implement OST programs based on the findings of your market research.

#### HOW DO WE ENGAGE STAKEHOLDERS IN MARKET RESEARCH?

- By involving them as members of the OST Research Task Force whose job is to plan and implement the market research.
- By designing a communications plan to inform stakeholders about the importance of OST programming, the role of market research in designing effective OST programs, and the ultimate results of any market research that is conducted and how those results will be used to enhance OST programming.

Communications is essential to market research—it not only enables communities to “get the word out” about the need for OST alternatives, but research findings can be used to generate excitement about and facilitate community engagement around OST programming. Market research is also an essential component of high-quality communications, since it shows groups involved in OST planning where to focus their media efforts and what to emphasize in those efforts.

Engaging stakeholders from the onset means either inviting individuals to participate on the OST Research Task Force or keeping them informed about the Task Force’s activities. The Task Force should consist of stakeholders who are interested in the market research process, have access to resources you might need for the market research, are affected by OST programs, or who could stop OST programs from being developed or enhanced, if they were so inclined.

#### WHAT COMMUNITIES HAVE LEARNED

Involving important stakeholders benefits the initiative. “When you have a local official on board and really taking leadership, it energizes the community. Our Mayor was very engaged throughout the whole process, and that was very helpful.”

*Catherine B. Walsh, Rhode Island KIDS COUNT. Conducted a multi-phase research project, including focus groups and a telephone survey of middle-school students and parents in Providence, Rhode Island. The purpose of the research was to understand middle-school students’ and parents’ perspectives relating to OST activities with the goal of developing OST activities that most effectively meet their needs.*

**A SPECIAL NOTE TO PROVIDERS:** Organizations that work with children and families often have very specific ideas about what works and what won’t work with regard to OST activities. In many cases these ideas are based on years of experience in dealing with at-risk children whose health, education, and social needs are tremendous—children in extreme poverty, for example, or children involved in the criminal justice system, children with disabilities or emotional problems, or those who have experienced physical or sexual abuse, neglect, or have witnessed family violence. While these insights are extremely valuable, we have found that communities engaged in OST market research need a broad spectrum of community perspectives—from community-based organizations to businesses, political and neighborhood leaders, parents, schools and school administrators, and kids themselves. Even if your organization is driving the OST planning process, remember that you play a vital role, but yours should not be the only—or loudest—voice in that process.

**A SPECIAL NOTE TO BUSINESS LEADERS:** Many businesses conduct market research—with a different focus than will be the case with OST programming perhaps, but the process is essentially the same—and you have valuable insights as to what’s involved with research, what resources are needed, and when to ask for outside help.

In addition, business leaders are often very good at leading people toward solutions, but may not have much experience working as equal partners with community

## WHO ARE THE STAKEHOLDERS?

Any group that is influential in the community in terms of OST should be considered stakeholders. Spend some time examining who the stakeholders and concerned constituencies are likely to be in your community—who needs to be involved in planning the market research? Who has resources that are critical? Are there strong ethnic or cultural communities? Examples of stakeholders include:

- Students, parents, and families
- Educators – principals, school superintendents, teachers, government organizations that support or are responsible for education, such as the state, county, or local Department of Education
- PTA or PTO organizations
- Government and political leaders, such as mayors, city or town councilors, or state or federal legislators
- Directors of community-based organization (CBOs), especially those that offer after-school and OST programs such as the YWCA, YMCA, Boys & Girls Clubs, 4-H, Future Farmers, Big Brothers/Big Sisters, Girl Scouts, Boy Scouts, or community centers
- Representatives from cultural and ethnic groups
- Leaders in business, especially businesses that support education initiatives and those who recognize the economic argument that OST programming is beneficial to employees, who are more likely to come to work if their children have safe options available when they are not in school
- Health care providers
- Prominent local funders, foundations, and philanthropists, as well as people who can mobilize local financial and other resources for OST programs
- Leaders in higher education, especially colleges and universities with an interest in supporting local communities
- Neighborhood leaders and grassroots organizers
- Representatives from faith-based organizations
- Representatives from social service agencies that serve children or are invested in child well-being
- Media representatives, including people from local newspapers, magazines, radio stations, television, cable, or internet

organizations such as schools, nonprofit agencies, neighborhood activists, or health or human service providers. Working with these organizations can be challenging for business leaders because in many cases, these organizations are as invested in the process of making decisions as they are in the outcomes of those decisions. If decisions are made using a process that excludes or devalues some people's ideas or concerns, then the outcomes are not likely to be accepted even if the outcomes seem reasonable from an objective standpoint.

Nevertheless, after conducting market research on OST programs and other issues of neighborhood health and well-being, we strongly believe that communities must shift from a “process” to a “product” orientation to establish high-quality OST programs without exhausting local resources, including people's volunteer time, community good will, and funding possibilities. This is especially true with market research, which takes considerable effort and needs to be oriented toward the end result—valid, credible information your community can access and use—or the task will never be completed.

There is nothing more frustrating to the business community than a task force that seems to exist for its own sake, with no tangible results in sight. At the same time, nonprofit organizations face political constraints that for the most part do not exist for the for-profit sector. A good example is school superintendents, who are hired by and must answer to school committees whose members may or may not have a background in education. In some areas school committee members are chosen by public election, while in others they are appointed by political leaders such as the mayor, governor, or a state department or agency. Superintendents have to balance the operational realities of running a school district—hiring teachers, managing administrative staff, working with state and local funders—against the political realities of answering to many different constituencies, not all of whom understand the issues schools actually face.

In this kind of context, business leaders can use their skills as entrepreneurs and motivators to guiding the OST Research Task Force's efforts. The idea is to lead, however, and not dictate.

## HOW DO WE ENGAGE STAKEHOLDERS WHO ARE NOT ON THE TASK FORCE?

If the OST Research Task Force does not have sufficient political support within your community or buy-in from important decision-makers, it is unlikely that the research results you obtain will be viewed as credible. At this stage, you may want to develop a **communications plan** which is a strategy for engaging key stakeholders and educating people about the need for OST programs.

Begin by creating communications goals, keeping in mind the following: (1) your communications goals should be realistic and action-oriented; (2) goals should be specific and measurable; and (3) keep to a minimal number of goals (e.g., one to three). You cannot achieve everything with one communications initiative. For example, the goals of a communication plan at this stage in your planning might be, “Convert 70 percent of the key stakeholders in our community into public advocates of [our market research],” or “Generate public support for the market research, ultimately leading to increased participation in the creation of new OST programs.”

Once the goals for your communications plan have been set, your strategies, targeted audience and communications tactics will all be designed to help you meet these goals. Workbook A provides instructions on developing a communications plan aimed at helping your group muster community support for OST programs.

**SEE WORKBOOK A:** For detailed information about developing and implementing a communications plan for OST program planning

The workbook provides information on many strategies that have proven successful for reaching and engaging important stakeholders.

## 3. CONDUCTING SECONDARY RESEARCH

Secondary research (also called background research) will help you understand the current situation and atmosphere surrounding OST programs in your community. Things to be aware of include the status of OST programs in your community—are there any, for example—and which constituencies support or don’t support those programs. If individuals and organizations do not support OST programs that already exist in your community, find out why. Which neighborhoods benefit most from OST programs? What grade levels and demographic groups take most advantage of the current programs?

Begin by having the OST Research Task Force decide what geographic area will constitute your “community” with respect to OST programs. A community can be defined in multiple ways. At a local level, a community can be defined as a neighborhood, an organization such as a community group or faith-based organization, a city or town, a county, or a region. Your task at this phase is to gather information about the geographic area you have designated as your community, in order to better understand the characteristics of kids and families, their possible needs and preferences, and their experiences with existing OST options, if there are any.

Secondary research gives you an opportunity to see what has worked, what hasn’t worked, and what gaps seem to exist. Sometimes secondary research is referred to as community assessment, needs assessment, or situ-

### WHAT COMMUNITIES HAVE LEARNED

Secondary research helps narrow your research focus. “In Providence, we didn’t have much data at the beginning, which is typical. Although the planning group felt that the biggest impact would be in middle school, they didn’t want to ‘jump to a conclusion.’ But as soon as they said, ‘It’s middle school,’ things took off. We could narrow our data gathering, and the results backed the middle school decision and gave us a very detailed view of what OST should look like at that age.”

*Robert Burakoff, President, Burakoff Consulting. Worked with Rhode Island KIDS COUNT to plan a multi-phase research project, including focus groups and a telephone survey of middle-school students and parents in Providence, Rhode Island. The purpose of the research was to understand middle-school students’ and parents’ perspectives relating to OST activities with the goal of developing OST activities that most effectively meet their needs.*

ation analysis, but we use the term to mean: (1) collecting whatever hard data already exists about a community; and (2) taking an initial look at a community's experiences with OST programs. The two main goals of secondary research are:

- Narrowing the focus of your research.
- Generating a list of questions you will need to answer in order to move forward with your OST planning.

#### NARROWING THE FOCUS OF YOUR RESEARCH

An important goal of secondary research is to narrow the focus of your community's market research to those groups of kids most likely to benefit from OST programming. A simple example might be a neighborhood that has several OST programs, all of which are for children ages 14 to 18. One option for this community would be to analyze whether the existing OST programs are meeting these kids' needs. Another option would be to focus on programs for children under age 14, because none currently exist in the neighborhood. The market research and subsequent planning and communications efforts would all focus on younger kids.

Overly broad, unfocused, and ultimately frustrating strategies we have seen communities struggle with include studying:

- Children of all ages—for example, what are the needs of kids in our community, from birth to adulthood? What kinds of OST programs do we need for infants, preschoolers, first through sixth-graders, middle school students, high school students?
- All days and times when kids are not in school—for example, what do we do for kids before school, after school, on weekends, during the summer, during spring and fall breaks, on holidays, on days the schools are closed for bad weather?
- All demographic groups—for example, researching the specific interests of every racial, ethnic, or income group in the community regardless of regional differences in access to existing OST programs.

- All possible locations and activities—for example, testing kids' and parents' reactions to every possible location in the community for OST programs, or every possible activity or program structure.

The natural response in the absence of decision-oriented planning is to say, "We need to study everything in order to find our focus." It is more efficient to start with an informed hypothesis about what is needed in a community than to start from scratch, or to study everything to find a focus. "Studying everything" assumes no one has any idea what kinds of OST programs are needed or whether programs are needed at all, and this is almost never the case.

- There are likely to be people in your community who have good ideas about which kids need OST programs, where they live, which schools they attend, what kinds of activities they might prefer, etc.
- Starting with a strong focus tends to move communities forward on developing OST programs. Starting without any hypotheses takes much longer, tends to exhaust people's energy before the planning is completed, and can waste much-needed resources—research on demand for OST programs costs money, and there is nothing more frustrating to communities than a community assessment or market research study with vague (and not very useful) conclusions.

#### ⇨ POINTER

##### **What *doesn't* work? Laundry lists.**

A classic mistake groups make is starting out with a "laundry list" of questions and ideas without taking a strategic view of what needs to happen to get OST programs up and running. People come up with every conceivable aspect of a community's needs, then try to research every population, every kind of program, every way of funding and managing a program, and so forth, until they end up with an outline for each and every possibility.

Communities are much better off when they begin with a clear focus and then gather data. Your group may discover that you need to change your focus, but in most cases there are people within the community who have a general sense of the demand for OST programs, and if you can engage these individuals from the beginning your OST planning is much more likely to result in concrete results.

If you find that the members of your OST Research Task Force lack experience or confidence in terms of setting goals and narrowing the focus of your research, a professional consultant can be helpful.

## GENERATING STRATEGIC QUESTIONS TO ANSWER

Once you have narrowed your focus, the next task is to generate a list of questions that your OST Research Task Force will need to answer before the group can decide what kinds of OST programs to create or what changes are needed in existing programs. A good question to start with is, “If we had to guess, which kids need OST options, and what kinds of OST programs are needed in our area?” Another key question is: who is the customer for OST programs? When children are very young, for example, parents make most of the decisions about what activities they will engage in. By middle school, kids may have some say over what they will do after school, although parents are still likely to be actively involved.

Middle school kids typically like to have a variety of fun, interesting choices and enjoy deciding what they will participate in. Parents want their middle school children to be safe and well-supervised. Unless an OST program is seen as both fun and safe, neither kids nor parents are likely to choose it. By high school, kids often make their own decisions about what they will participate in, at times with little or no parental input. These kids still need safe alternatives, but their choices will depend on factors such as how fun the activity is, the cost, whether or not transportation is provided, and whether their friends also participate.

These trends vary from region to region, which means researching local attitudes toward OST programs is essential. Depending on where they are from, for example, recent immigrant families often supervise their children’s OST activities well into high school. Other ethnic and cultural traditions may grant younger children the autonomy to decide whether or not to participate in OST activities.

## DETERMINING WHAT BACKGROUND INFORMATION IS NEEDED

Once you have narrowed your focus and generated questions about OST programs in your community, you should obtain basic information about the size of the community or neighborhood you are planning to serve—are you targeting just one neighborhood, for example, or an entire school district, a county, or a region within your state? How many families live in the area, and how many kids of different ages? Who are the people that make up the community in terms of:

## WHO IS THE CUSTOMER FOR OST PROGRAMS?

Child’s grade level	Who tends to be influential in deciding what activities the child will participate in?
▪ Elementary	▪ Parents
▪ Middle School	▪ Parents and kids
▪ High School	▪ Kids

- **DEMOGRAPHIC CHARACTERISTICS.** How many children live in the area, and how many within different age groups (e.g., 0 to 6, 7 to 13, 14 to 16, 17 and 18)? Are most kids living in two-parent versus one-parent families? What proportion of kids live in families in which all adults in the household are employed? How do families manage child care? What are local trends in terms of race and ethnicity of families with children?
- **ECONOMIC STATUS.** What is the average family income? What is the unemployment rate? How many families and kids live in poverty? How many are receiving Medicare, food stamps, or WIC vouchers, or using other forms of public assistance? What proportion of kids receives free or reduced-price lunches at school?
- **SOCIAL FACTORS.** What problems exist that suggest OST programs could benefit kids in your communities? What barriers exist to kids succeeding?
- **SCHOOLS.** Where are schools located and how many students attend? Are schools already operating after-school or extended day programs? Are school buildings open outside school hours for community activities? Who is the district superintendent, and what is his or her attitude toward OST programs? Other school-related data you might find useful include:
  - Measures of educational performance, such as standardized test scores or whether or not schools receiving funding under Title I have been identified as needing improvement under your state’s No Child Left Behind program
  - Educational attendance and dropout rates
  - Participation in free or reduced-price school lunch programs
  - Percentage of students receiving special education services
  - Percentage of students with disabilities

Ultimately, the OST Research Task Force will need to determine: (1) who is most likely to benefit from OST programming, or who has needs that OST programs can address? (2) kids' characteristics, including where they live, what schools they attend, and how far they can reasonably travel to reach programs they want to use; and most importantly, (3) what the demand is for OST programs, including what kinds of programs kids want, what kinds of programs parents will trust and allow their kids to attend, and what kinds of programs can be offered, given your community's resources?

#### WHERE TO LOCATE BACKGROUND INFORMATION

As discussed earlier, background research involves finding, analyzing, and using information that someone else has already collected. These data can be found in many different places at very low cost, if not for free—an excellent example is the 2000 U.S. Census of Population, which has detailed information about children and families, most of which is posted on the Census Bureau's website, [www.factfinder.census.gov](http://www.factfinder.census.gov). The website has an easy-to-use tool for generating demographic and socioeconomic statistics down to the Census Block level. With some ingenuity, thoughtful "digging," and persistence, you may also be able to find the information you need from the following:

- **STUDIES:** A very good strategy is to include representatives of organizations that have conducted studies you might find useful on your OST research task force, or involve them in the larger OST planning effort. Has any market research about kids and families in your community already been conducted by other businesses or organizations? In many cases, people will give you these studies or the relevant information if you let them know what you are using the data for (i.e., to benefit kids). Try asking if any of the following have studies they have conducted recently:
  - Human service agencies dealing with at-risk children
  - School systems or local departments of education
  - Local hospitals, health centers, or health insurance plans that serve kids
  - State or federal public welfare agencies serving your region
  - Local businesses
  - Newspapers, magazines, or radio stations
  - Local colleges or universities

- **GOVERNMENT:** Contact your state's *U.S. Census Data Center* and ask them to help you find statistics about children and families in your community. These centers are the repositories for information from the U.S. Census of Population and Housing as well as many other state and federal data-gathering agencies, such as the Centers for Disease Control and Prevention, U.S. Department of Education, U.S. Department of Health and Human Services Administration, and so forth.

State data centers are often (but not always) affiliated with colleges or universities and are usually extremely helpful. If they cannot give you the information you need for free or at very low cost, they can refer you to other organizations that will do so. The website for finding a Census Data Center near your community is [www.census.gov/sdc](http://www.census.gov/sdc). Another excellent site for free information is [www.fedstats.gov](http://www.fedstats.gov) which is the gateway to literally hundreds of agencies that collect data about children, families, and issues that affect communities. Many agencies have websites that will let you generate reports for specific geographic areas, such as regions, states, cities, towns, or Census Tracts.

- **FEDERAL AND STATE DEPARTMENTS OF EDUCATION:** Every state has a department of education (or equivalent agency) that acts as a repository for information about public, and in some cases also private, schools in the state. These departments report to the U.S. Department of Education and reports about school characteristics and performance are published regularly—a list of reports and statistics compiled on a federal level, for example, can be found at the U.S. Department of Education's website [www.ed.gov/about/reports/annual/nclbrpts.html](http://www.ed.gov/about/reports/annual/nclbrpts.html). To find resources for your state, search the *Education Resource Organizations Directory* at <http://wdcrobcolp01.ed.gov/Programs/EROD>.
- **LOCAL MEDIA:** Search for articles in local media that have focused on OST programs. In some communities, newspapers have archives that can be searched online (if the newspaper has a web page), and many also have news librarians who can find articles for you either for free or for a nominal fee.
- **INTERNET:** Use a search engine like Google, Yahoo, MSN, or Ask Jeeves, to name a few of the better-

known examples, to locate articles or information about OST programs in your area. Include the name of your community in your search, and try searching for terms such as:

- “OST programs”
- “out of school time programs”
- “after school programs”
- “programs for latchkey kids”

#### UTILIZATION RESEARCH ON OST PROGRAMS

A critical component of your initial market research is finding out about the OST programs that already exist in your community, if there are any. Begin by talking to individuals who are currently running OST programs in your community, region, or state, and research those OST programs. What do these programs involve, and who started them? How are they funded? What kinds of kids or neighborhoods do they serve? For each existing OST program, try to find out:

- Who is the provider—the city, a school, a nonprofit agency, a business?
- What kinds of activities are offered, and when and where?
- Who are the activities designed for, including which age groups?
- Why are those particular activities offered, and not others?
- How many kids participate?
- Is there a waiting list? How many kids, and how long is the wait?
- Are there openings? How many and why aren’t the programs being used to capacity?
- How did the program establish a need for the activities it offers?
- What has worked well?
- What challenges has the program faced, or what hasn’t worked?
- Does the program have specific quality standards? What are those standards?
- Who funds the programs?
- Who in the community is most supportive of and engaged with the program, and who are the program’s detractors?

The objective is to create an inventory of OST programs in your community, which will help you identify potential “gaps” your community might be able to address. For example, you might discover certain age groups for which few—or no—OST programs ex-

ist, or you might discover that programs are underutilized because the transportation system doesn’t reach those neighborhoods where most kids live and go to school.

If you do not have experience with OST programs, we also recommend that you visit some either locally, if any exist, or elsewhere, to more fully understand the planning and design process and the kinds of activities offered. Researching government actions regarding OST programs locally or in your county or state can also be helpful—for example, public school systems are increasingly interested in working with OST programs to support learning objectives associated with the No Child Left Behind Act. Accomplishing this goal requires that stakeholders—local government, schools, and OST providers—coordinate their activities to provide a seamless “product” for children that supports educational goals even when they are not in school.

The largest sources of funding for OST programs vary by state, but typically include federal, state, and municipal dollars, childcare subsidies, foundation grants, or funds allotted by intermediaries that provide technical assistance and financial assistance to individual OST providers. Knowing how this system works is crucial, and a good strategy is to talk to local experts (such as existing OST programs or the local schools) to get a better picture of what is likely to be available in your community.

**SEE WORKBOOK B:** For more detailed information about conducting background research

**SEE WORKBOOK C:** For more detailed information about conducting utilization research on existing OST programs in your community

#### 4. CONDUCTING PRIMARY MARKET RESEARCH

If you cannot find the information you need from existing studies or other secondary sources, you may want to consider primary research, such as telephone surveys or intercept interviews. These tools are discussed next, and you can also refer to the workbooks which provide specific instructions on various secondary and primary research methods.

*For comprehensive instructions on how to proceed with different methods, refer to the following workbooks:*

**FOCUS GROUPS: WORKBOOK D**

A focus group is a small group of about eight to ten people participating in an in-depth discussion about a particular topic, led by a moderator. Focus groups are an ideal research method to combine with other, quantitative (i.e., numeric) research methods.

**IN-DEPTH INTERVIEWS: WORKBOOK E**

An in-depth interview is an open-ended, discovery-oriented method to obtain detailed information about a topic from a stakeholder. This is a good method to conduct at the beginning of a larger research project when there are questions about how to narrow the focus of the research, or what questions need to be explored through the research.

**TELEPHONE SURVEYS: WORKBOOK F**

A telephone survey is a quantitative research method for determining what people think and how they behave. This research method involves calling and interviewing a representative sample of key stakeholders. This type of research is helpful if you need to know what proportion of a larger population (e.g., your town or county) shares specific attitudes or needs. This research method typically requires more resources (i.e., money and time).

**IN-PERSON INTERVIEWS: WORKBOOK G**

An in-person interview is an interview conducted in person on a one-on-one basis. People are chosen for the research because they are readily available or have specific characteristics, making this a good research method if you need to reach people who you would not be able to reach using other methods (such as low-income households without phones).

**SELF-ADMINISTERED SURVEYS: WORKBOOK H**

Self-administered surveys do not require the use of an interviewer in administering the surveys. Respondents read the questionnaire and record their responses themselves. Self-administered surveys can help you obtain information similar to that which you would obtain through a telephone survey, but they are usually much easier for communities with limited resources to conduct, because they require less time and money.

## QUALITATIVE OR QUANTITATIVE? CHOOSING THE RESEARCH METHOD THAT IS RIGHT FOR YOUR COMMUNITY

The research method you select—qualitative, quantitative, or a combination—will depend on the information you want to obtain. Ideally, communities will use both qualitative and quantitative research methods to obtain the information they need for high-quality OST programs. For example, a community might begin by conducting focus groups or in-depth interviews as a way of identifying themes that may affect the success of OST programs, such as the reasons why kids aren't using existing OST programs, or what kinds of activities parents approve of and would like their kids to participate in. The community would then follow up with a quantitative survey, to see the extent to which the themes identified during the focus groups or in-depth interviews are held by the general public. Qualitative research is an excellent strategy for understanding “why,” in other words, while quantitative research is used to understand “how much” or “how many.”

The important thing to stress is that neither quantitative nor qualitative approaches to market research are inherently superior in terms of getting you the information you need to make decisions about OST programs. Your task is to decide what information is required about kids and about your community in order to design the best possible OST programs. The next chapter describes how to conduct market research, including the overall process, techniques, and who should be involved in the market research process.

## DETERMINING WHETHER TO CONDUCT MARKET RESEARCH USING INTERNAL RESOURCES OR TO OUTSOURCE MARKET RESEARCH

Can you do market research internally? Absolutely, although doing so means your OST research task force must plan carefully. We recommend that you create an OST market research plan. A basic plan includes the following steps, many of which have been previously discussed:

- **GOALS:** What do we hope to achieve from our OST initiative? Who are the “customers” for OST programs in our community—what age groups or family characteristics, and what neighborhoods, schools, or geographic regions? Who are we not serving, and why this focus?
- **STAKEHOLDERS:** Who are the major stakeholders who will use the market research results to make decisions about OST programs in our community? Who wants to know about kids and families and their preferences for OST activities? Who might fund OST initiatives, and what information do they need to decide?
- **KEY QUESTIONS:** What questions do we need to answer in order to plan OST programs effectively? What specific information, statistics, or facts do we need?
- **DATA:** Which research method is best given the questions we are asking, and how will we generate the

### USES OF QUALITATIVE VS. QUANTITATIVE RESEARCH METHODS

#### Qualitative Methods are Best Used For:

- Understanding “why”
- Generating in-depth information about people's attitudes, behavior, characteristics, use of services, etc.
- Uncovering themes or the underlying motivations behind people's behavior
- Hearing from populations that are hard to reach with a quantitative survey, such as kids from small minority populations

#### Quantitative Methods are Best Used For:

- Understanding “how often” or “how many” or “what percent”
- Seeing whether themes identified during focus groups or other qualitative methods are held by the larger community or population as a whole
- If surveys are repeated periodically, the data can be tracked over time
- Comparing subgroups, such as boys vs. girls, different age groups or grades, different neighborhoods within a larger geographic area, single parents vs. married couples, and so forth

Ideally, communities use both qualitative and quantitative methods. Qualitative research helps focus the quantitative research and provides insight, depth, and context to quantitative findings.

information we need? Do we need primary or background research? Are qualitative methods—focus groups or in-depth interviews—the best resource, or would quantitative methods, such as a survey, be best? What is our data collection plan in terms of:

- Preparing questionnaires, interview guides, or focus group moderator guides
  - Deciding who to include in the research (e.g., kids, parents, schools, teachers)
  - Collecting the data—making phone calls, moderating focus groups
  - Getting the data into a format that can be analyzed (i.e., computer data-entry)
  - Managing logistics and timelines, and providing quality supervision of the process
- **ANALYSIS AND REPORTING:** Who will analyze the information, how will it be reported, to whom will it be reported, and what is the timeline? Communities must keep in mind that the data they collect will need to undergo some process of analysis, and that data analysis takes a specific set of skills. Think about this at the onset of your research planning process so that it doesn't come as an unpleasant surprise at the end.

**CONDUCTING MARKET RESEARCH USING INTERNAL RESOURCES:**

Many communities successfully plan and conduct their own OST market research, in some cases exclusively and in other cases using consultants at key points during the process. In order to do so effectively, you must:

- Identify a person to manage the market research process
- Identify the people with the skills and/or aptitude to conduct the research
- Ensure that the people managing and conducting the research have the resources they need—including time away from their normal responsibilities

In general, conducting qualitative and quantitative research is easiest if your Task Force already has access to the population you are interested in researching. For qualitative research, for example, one part of the process that can frequently be difficult involves recruiting focus group participants. Conducting focus groups with populations that are easily reached is well within an OST Research Task Force's capabilities, especially if a member of your Task Force already has connections to those populations. Examples of easily-reached populations might include:

**WHAT COMMUNITIES HAVE LEARNED**

**Successful results can be achieved using internal resources.** “[We were] very satisfied [with using internal resources for the study]. We had control over the timing of different aspects of the work, and we had our hands on the data itself and could look back at the questionnaires to see if there were any specific problems. So we had control over the process from beginning to end. . . . As a result of our having conducted the research ourselves, we know where the problems are, and we know more specifically where issues in survey administration came about. . . . We know what worked well from year to year and what didn't.”

*Bob Goerge, Chapin Hall Center for Children. Conducted a multi-phase research project, including self-administered surveys of high school students in Chicago, in-depth interviews with students, and an inventory of OST programs in Chicago. The objective of this research was to better understand participation in OST programs and other activities among Chicago youth, as well as the effects of established programs.*

- Kids who participate in existing OST programs in your community
- Parents who meet regularly, such as PTO or PTA groups
- Administrators or staff of community-based organizations that work with kids
- Business leaders who meet regularly, such as members of Chambers of Commerce

With creativity and a willingness to adapt to people's circumstances in terms of when or where focus groups are held, you may find it possible to run the groups yourselves. Engage someone with group facilitation skills to moderate the focus groups. Refer to Workbooks D and E for details on how to conduct qualitative research on an in-house basis. Keep in mind that there are a lot of steps involved in these processes (for example, you will probably need to send permission slips home for any research you are going to do with kids); these workbooks will guide you through these considerations.

For quantitative research, again, if you can easily reach a population and have the human resources needed

to conduct interviews, you may want to consider conducting OST-related surveys internally rather than hiring a consultant. The easiest populations to survey are referred to as “captive audiences” in that they are already convening for some other purpose—schoolchildren are an excellent example. If the Task Force can get permission from the local school district to conduct a self-administered survey of kids while they are in school, this is one of the easiest ways to reach large numbers of kids. Another example might involve using existing OST programs to reach kids (e.g., by interviewing kids who attend these programs) or parents (e.g., by asking the programs to give you mailing lists or telephone numbers so you can interview parents about their kids’ OST experiences). Refer to the workbooks for detailed instructions on how to conduct quantitative research to gauge whether this might be a possibility for your community.

#### WHEN CAN CONSULTANTS BE HELPFUL IN RESEARCH YOU ARE CONDUCTING?

You might consider using a consultant to help you decide which research method is best given your information needs, for example, or to assist in defining key questions or preparing a questionnaire. Consultants can also help you locate the background research you need, and can design and conduct more complex aspects of market research such as surveys or focus groups. Research does involve a significant investment in human capital, so if you decide to do the research internally, make sure you have the resources you need—people and time—to do a high-quality job.

A good way to judge whether a consultant might be helpful is to ask what the risks would be of using your own internal resources. The most important potential risks of not using external resources include: (1) you might not get buy-in from important stakeholders and constituencies; (2) you might not have the needed skills within your planning community, or might exhaust those resources before the market research is completed; and (3) the possibility that you might not make the right decisions about OST programs.

Other considerations to guide you in determining whether a consultant would be helpful in your market research planning process:

- **EXPERTISE:** If the resources you will use to enhance OST alternatives in your community are considerable—if you will need to spend large sums of money to get programs up and running, for example—then it may be worth engaging a consultant who has the skills and expertise your planning team may not have. Remember that the costs for OST programs may include:

- Development, including funds spent on a facility, equipment, supplies, and staff.
- Lost opportunities. What happens if you emphasize one kind of OST option when a different option would have higher attendance?
- Overuse of resources, which include volunteer time, energy, and good will, as well as political capital. Market research takes more time and effort than may be apparent at first consideration—people commonly think things like, “We’re only telephoning 300 parents and

we have all these volunteers in our data base, that shouldn’t take too long,” or, “We could have that intern from the university do the survey next semester,” when in fact, doing the task well requires training, skills, attention to detail, considerable patience, and someone to supervise the process.

#### ⇨ POINTER

Try to hold focus groups at times that are convenient for these populations—parents might devote a PTO or PTA meeting to a discussion of OST programming, for example, or focus groups with kids might be held after they have participated in an activity held at a local school. Local businesses might agree to attend a focus group held immediately before or after a Chamber of Commerce event.

- **RESOURCE AVAILABILITY:** Does your planning team have the skills needed to do a good job with the market research? Even if you do have skilled and experienced local resources, do these individuals have time available to devote to the task? You need to ask whether or not your organization can afford to shift staff to a different activity—such as interviewing people, collecting and analyzing background research, and so forth—without jeopardizing other aspects of your organization’s operations. Finally, do you have the money to pay a consultant? If not, you may have no choice but to do the best possible market research you can with your own resources.

- **NEED FOR EXTERNAL OR INTERNAL BUY-IN:** The more concerned your planning group is with your ability to engage key constituencies or stakeholders, the more helpful an outside consultant is likely to be. Using a consultant can reassure stakeholders that you are “doing the job right” and are working hard to minimize bias or other factors of potential concern to stakeholders, such as:
  - **Quality**—If you are concerned that stakeholders will question the validity of the market research results or how you collected the data, a consultant can help assuage fears about quality.
  - **Objectivity and credibility**—Using an outside expert in market research can help in addressing people’s fears about objectivity, especially if the information you collect about kids’ needs or your conclusions about the research results are controversial or go against “common wisdom.”
  - **Outside perspectives**—Using an outside consultant gives you the opportunity to consider alternative perspectives. Even if you disagree with the consultant about the conclusions that are drawn from the research, an outside perspective can help you identify community

## WHAT COMMUNITIES HAVE LEARNED

Outsourcing can add quality and credibility to the research. “They have a credibility—it’s what they do for their business. It’s their trade, so the results and findings are seen as highly credible because you had the focus groups and survey process done by a competent firm. It is really important to hire a firm that also has the capacity to produce a final report and summary that is easily understandable by a wide audience. We appreciated having the funds and resources to actually be able to hire somebody to do the market research and present the results.”

*Catherine B. Walsh, Rhode Island KIDS COUNT. Conducted a multi-phase research project, including focus groups and a telephone survey of middle-school students and parents in Providence, Rhode Island. The purpose of the research was to understand middle-school students’ and parents’ perspectives relating to OST activities with the goal of developing OST activities that most effectively meet their needs.*

## ADVANTAGES AND DISADVANTAGES OF CONDUCTING RESEARCH USING INTERNAL RESOURCES

### Advantages:

- Likely to be much less expensive
- You maintain control over every aspect of the research process
- You likely have a deeper understanding of your community’s circumstances and needs, which may make certain steps in the research process more efficient

### Disadvantages:

- Likely to be much more time consuming
- You may lack the necessary objectivity and distance from the issue
- May be more difficult to get buy-in or support from important stakeholders and constituencies
- May not have the needed skills within your planning community, or may exhaust these resources before the market research is completed
- Runs the risk of not being able to make the right decisions about OST programs

## ADVANTAGES AND DISADVANTAGES OF OUTSOURCING RESEARCH TO CONSULTANTS

### Advantages:

- Likely to be much less time consuming
- Consultants will have the necessary expertise to complete the research
- May make it easier to get buy-in or support from important stakeholders and constituencies
- Consultants will have the necessary objectivity and distance from the issue

### Disadvantages:

- Likely to be much more expensive

strengths and challenges you might not otherwise have considered. The value lies in “having another pair of eyes” as you go through the OST planning process.

#### DETERMINING WHAT KIND OF CONSULTANT TO HIRE

If your group decides that an outside market research consultant should be hired, there are many possibilities. The best possibility is a market research consultant or company that has worked with and is sensitive to the needs and characteristics of nonprofit organizations and also has a solid history of practical, no-nonsense, results-oriented research. Both marketing research companies and faculty at local colleges or university can be excellent choices.

The most important consideration is whether or not your group can work with the consultant and will trust the validity of the research results. It is not necessary for all members of your group to like the consultant, but you need to work well together and you need to feel in control of the research process. There should be agreement within your planning team that the consultant has the necessary skills and experience. Key things to look for in hiring a consultant for market research on OST programs:

- Is the consultant able to maintain neutrality, comfortable with diverse audiences, and experienced in working with people like you or your type of organization?
- Does the consultant understand or have basic knowledge about OST programs? Does the consultant have experience in designing and conducting market research—especially with respect to OST programs? Avoid consultants whose skills or experience seem vague or unrelated.

- Is the consultant overly wedded to a specific methodology, such as focus groups, telephone surveys, in-depth expert interviews, etc.? Consultants who recommend the same research methodology—focus groups, for example, or surveys—regardless of the information you need or the questions you are asking are not always effective. Different research methods have strengths and weaknesses in different situations.
- Does the consultant have a substantial history of producing results on time and within budget? Can the consultant produce acceptable references? When you call the references, what do they say about the consultant? A bad review should be taken seriously.
- Is the consultant willing to prepare a written proposal, and when you receive the proposal, is it: (1) clear and understandable, (2) reasonable in scope and recommended research methods, (3) responsive to your request, and (4) carefully edited and free of spelling errors? If any one of these conditions is missing, then it is likely that the reports you receive from the consultant will be disappointing.

Communities sometimes focus on aspects of a consultant’s experience that seem important, but can be irrelevant in terms of the quality of research the consultant is able to provide. For the most part, where the company or consultant’s office is located—either within your local area or outside the region—does not matter, as long as the consultant is knowledgeable about OST programs, knows how to design and conduct high-quality market research, and has (or can get) a good understanding of the issues children face in your particular community. Also, few consultants will have all of the specific kinds of experience that you may be looking for, such as experience with the exact population or exactly the same kind of community.

#### RESEARCH COSTS

In most cases, communities get what they pay for in terms of market research. The consultant who charges the lowest price may not be the best choice for your community. Research costs money, so expect to pay for quality work.

To guide you in setting your expectations for research costs and determining whether your community has the available resources to outsource your market research or some portion of the project, each workbook in this guide includes a “Guide to Hiring Vendors” section that includes estimates for how much you should expect to pay for different types of consultants. These costs will vary widely depending on factors such as geographic area, scope of the project, etc., and this information is intended as a starting point for your planning process and allocation of resources. We have included a range of cost estimates, from a low end to a high end, whenever appropriate.

## 5. USING THE RESULTS

When the OST Research Task Force has completed a market research study, the task force needs to strategize about how to use the research findings, how to communicate the findings to its key stakeholders, and based upon how it will use the findings, when it should conduct market research again.

In terms of using the research findings, the ultimate goal of market research is to help you envision high-quality OST options that are designed with kids' and parents' needs and preferences in mind and are delivered in a manner that encourages maximum participation. Groups can get stuck at this stage either because they disagree about what the market research says, they disagree about what should be done about the findings, or they cannot come to consensus about who, what, when, where, how, and so forth.

Analyzing market research information and generating conclusions involves careful work and critical thinking, but the process is not inherently difficult. The workbooks have detailed information on how to analyze specific kinds of information, including information from focus groups and in-depth interviews and quantitative data from surveys. On the following page is a brief overview of a process we've found works well for communities.

### GUIDELINES FOR ANALYZING MARKET RESEARCH RESULTS

- Designate one person to analyze the market research. Analysis by committee is extremely frustrating—it is much simpler and easier to have one person go through the data, write down results, and report back to the planning team. You can always go back to the original data if you have concerns or questions.
- Break the job down into manageable parts. Start by reviewing the Task Force's original goals and key questions. What were you trying to find out?
- Organize all of the questions you asked during surveys, focus groups, etc. in terms of how they relate

to your goals and key questions. For each goal and key question, ask:

- What did people say?
  - What was the most frequent response?
  - What does this information mean?
  - What is the simplest way to summarize what happened?
- Get other people's opinions if the results are confusing or aren't obvious.
  - Be patient, thorough, and try not to panic, which is not always an easy task when faced with large quantities of data.
  - Write a report of the results. Be brutally honest. Write down only what the results say even if you don't agree with the information or your perspective is different. If the planning team wants you to draw conclusions about the information, make these suggestions and conclusions separately and clearly label what is your opinion and what you found in the results. Both facts and opinions are

needed, but people distrust market research if it's unclear which statements are which.

You will need a computer and some sort of database software to analyze people's responses to surveys. One tool that is free and includes "look-alike" versions of commonly-

used tools such as Word, PowerPoint, Excel, and Access is *OpenOffice 2.0*. This software has a database management system that can be used for basic data entry and analysis. There are versions for Windows, Linux, and OSX, and the technical support is helpful as long as you have basic word processing and spreadsheet experience. Detailed information on analyzing survey data is presented in the workbooks.

### USING RESULTS TO GUIDE OST SOLUTIONS

The person who analyzes the market research data should sit down with the OST Research Task Force and provide a full briefing of the results. Understand what the hot buttons are and what next steps are being recommended—evaluate each of these elements within the climate you already know exists around OST programs in your community. Identify areas that could be problematic and community strengths

#### POINTER

##### **A word of caution.**

It can be difficult for an organization to analyze data on its own without someone who has expertise in this area. You may be able to obtain general information without an expert, but do not underestimate the importance of the data analysis phase.

that the study identifies. What neighborhoods and populations will benefit from the recommendations? Will there be funding issues? Does the research suggest OST programs should cover a diverse group of children, or are there specific groups who are most likely to benefit from and use OST options including any specific programs—existing or planned—that you may be examining? These will all be areas of focus in communicating the survey results and recommendations to key stakeholders and the broader community.

Next, engage in a brainstorming process to develop OST strategies based upon the research results. Your goal is to develop creative strategies that will result in OST programs that will:

- Meet kids' needs and interests
- Appeal to parents
- Address barriers to OST participation
- Use existing assets
- Meet community goals for OST programming

This is not a process that can be easily done by committee. If you have immersed yourself in the data, you may find that your best strategies occur to you while you are driving to work or in the shower. On the next page, we present a fictionalized example of a strategy developed by a planning team based on the actual experiences of a large city.

#### HANDLING DIFFERENCES OF OPINION

Remember that differences of opinion are a necessary and inevitable product of good planning. Research findings are often challenging especially if people disagree about what the results of a market study mean. People may believe a problem exists, for example, but the research suggests the problem does not exist or is much smaller than what people commonly assume. One person's problem may be another person's non-problem, and sometimes communities focus so much on one kind of human need that they divert scarce resources and thus create a new need—for example, a community might focus entirely on early childhood education (e.g.,

### A FICTIONALIZED EXAMPLE OF USING MARKET RESEARCH TO GUIDE OST STRATEGY AND PLANNING

#### HYPOTHESIS

We know from our OST inventory that there are many programs in our community, but enrollment is low. We suspect several factors are keeping kids from participating, such as lack of transportation and parents' concerns about safety.

#### KEY QUESTION

What are the major barriers for middle school kids and parents in terms of using OST programs? How do we increase middle school students' participation in those programs?

#### METHODOLOGY

- Focus groups with students and parents
- In-person interviews with students
- Telephone survey of parents

#### RESEARCH FINDINGS

- The biggest barrier to OST participation among parents is the safety of their children, which relates to transportation and supervision at the programs
- The biggest barrier to OST participation among kids is not having fun activities, and not having choices

#### OUR COMMUNITY'S OST PROGRAM STRATEGY: NEIGHBORHOOD CENTERS

By concentrating in centers, we can better arrange for safe transportation to and from the centers, and safety at the centers, thus meeting parents' needs. The centers become a fun location for kids, because their friends are there and there are many different options. Kids can change what they participate in on a day-to-day basis, if they want, thus meeting kids' needs. By offering activities that have a learning component along with fun, the centers can reinforce what is taught in the local middle schools, thus meeting the community's needs.

Head Start or other childcare alternatives for at-risk families) and so neglect middle school students, who then enter high school less prepared than they might have been, had good quality OST options for middle school been a priority.

Keep reminding people that it is impossible to identify every human need in a market research study, just as it is impossible for one program or initiative to solve every possible problem that kids, families, or the community faces. In fact, political realities often interfere with attempts to solve problems. Think of how many times your group has approached problems in the following ways, or has balked at new ideas or new ways of dealing with an issue:

- *“The problem can’t be helped because there is no money.”*
- *“The problem can’t be helped because we don’t have the support from the community to move forward. All those other people are hampering our efforts.”*
- *“We think other issues have higher priority.”*
- *“Those people don’t deserve help (or don’t want help, or cannot be helped, or other variations on this theme).”*
- *“That isn’t what we (our agency, school, community center, group, etc.) do,” or, “Someone else is supposed to handle that issue.”*
- *“We’ve always done it this way, and we don’t like change.”*

Getting past entrenched, long-held beliefs and patterns can be tricky especially when groups are highly invested in an issue or have historically managed a problem in a certain way. Hire a facilitator, if need be, who has expertise in managing groups or helping groups to communicate effectively—this can be an excellent way of minimizing a group’s stress, prompting people to embrace change, and helping people to listen, learn from each other, and be forthcoming with ideas, energy, and possible resources.

## 6. IMPLEMENTING THE COMMUNICATIONS PLAN

Part of implementing plans for OST programs is getting the word out to the community about the results of market research you have conducted and the conclusions you have drawn from that research. Media relations are critical for a number of rea-

sons—local newspapers, radio stations, and television channels have a large influence on the awareness and opinions of people and organizations in your community. When people read a positive story about the OST research or see an editorial on the Op-Ed page in support of a program, they are more likely to have a favorable opinion of the issue. Communicating results in these ways also lets people who participate in surveys, focus groups, or other kinds of market research know that their opinions are valued and are being used to create the best possible OST programs for their communities.

Furthermore, a communications plan must include ways of informing parents and kids about OST programs that are now becoming available or have opened. If you have included a broad range of stakeholders in your planning community, you will have many different venues and resources for communicating about the market research you have conducted and about OST alternatives you are considering on the basis of that research. There are a wide variety of tactics that can be utilized to disseminate the OST messages, such as:

- Leveraging the media to provide editorial coverage of the issue and the ongoing programs.
- Reaching out to grassroots organizations and nonprofit groups with a vested interest in OST programs.
- Using people with influence in your community to help deliver the messages, through community forums, media opportunities and organized events.
- Creating direct mail pieces that can be distributed to your target audiences.
- Leveraging the internet for outreach and education of your audiences.
- Asking local businesses to help deliver messages about OST programs to customers.

**SEE WORKBOOK A:** For detailed information about developing and implementing a communications plan for OST program planning

# LOOKING TO THE FUTURE: ONGOING MARKET RESEARCH

Market research is most effective if it is conducted regularly. For example, the results of a study may lead your community to develop a pilot OST program. Your community should consider conducting market research in relation to the pilot program, in order to assess how well the program met the needs of students, parents, and the community. The results of the study can be used to determine whether or not to expand the pilot program and how to improve it.

In addition, finding out what kids and parents want and assessing their satisfaction with their options should be an ongoing pursuit, because kids, parents, and communities change over time. Activities that were highly appealing to schoolchildren and parents a few years back may or may not be appealing to future generations. Two useful tools OST programs can use right away are: (1) tracking how many kids use the program overall as well as specific activities or services; and (2) interviewing kids and parents periodically to measure satisfaction with the program and get feedback about what is working well or not so well.

## **TRACKING PROGRAM ATTENDANCE**

Tracking statistics about program use will help you gauge how effective your outreach efforts have been as the program begins—and monitoring trends in use of OST programs is a good strategy for seeing whether the program needs fine-tuning. Kids won't use a program they think is boring, for example, and parents won't allow their children to go to an OST activity if they sense the location or the activity might not be safe or age-appropriate. A drop in attendance, in other words, is like the proverbial canary down a mine shaft. If the canary doesn't come back, you know something is wrong with the mine.

OST programs should develop ways of tracking participation that are straightforward, easy for staff to understand, and that produce usable information. For example, simply knowing that a program attracts 12 kids on Monday, 13 kids on Tuesday, and 15 kids on Wednesday does not tell you whether these are the same kids, or new participants. You may need additional support to develop useful systems for recording data about your programs—two possibilities include asking existing

organizations that have developed these kinds of data systems to help you design your program's system, or hiring an outside consultant.

## **MONITORING SATISFACTION WITH OST PROGRAMS**

To measure satisfaction, a program could conduct in-person interviews with kids during the time they participate in an activity, or have kids complete brief self-administered questionnaires to record their opinions. Even very young children can participate in a survey if it is designed with their level of cognitive development in mind—in fact, in our experience, elementary school kids are among the most enthusiastic of survey participants. Kids love being asked what they think, and they will help you understand what they like and dislike about an OST program or activity if you give them the opportunity to do so and listen to what they say.

## **LONG-TERM OST PLANNING**

You might also want to consider reconvening the OST Research Task Force every two to three years to review the OST environment in your community, see how OST programs are doing with respect to attendance and satisfaction, and decide whether additional market research is needed.

Go over the original market research findings and discuss the extent to which the goals the planning community set for OST have been met—and if you are not sure, consider whether follow-up research is needed to gauge the community's progress. Try to include at least a few people who participated in the initial Task Force, so that a sense of history is maintained.

As your OST initiative evolves, you may decide you need to employ a different market research method than you have conducted previously, or you may decide to repeat a study to find out how people's attitudes or experiences have changed over time. In the workbooks that follow, you will find detailed information about how to create a communications plan and conduct market research that will help you in planning and tracking your community's OST initiative.

# NOTES

<sup>1</sup> Intermediary organizations operate between funding sources and programs providing services. Examples include the Providence Afterschool Alliance ([www.mypasa.org](http://www.mypasa.org)) or the DC Children and Youth Investment Trust Corporation ([www.cytic.org](http://www.cytic.org)).

<sup>2</sup> Susan Bodilly and Megan K. Beckett, *Making Out-of-School Time Matter: Evidence for an Action Agenda*, (Santa Monica, CA: Rand Corporation, 2005). This document is available for free download at [www.wallacefoundation.org](http://www.wallacefoundation.org).

<sup>3</sup> Ann Duffett and Jean Johnson, *All Work and No Play? Listening to What Kids and Parents Really Want From Out-Of-School Time*, (New York, NY: Public Agenda, 2004). This document is available for free download at [www.wallacefoundation.org](http://www.wallacefoundation.org).



