



Survey Policy

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1 Introduction

In January 2018, the responsibilities of the survey team, from what is now the Clinical Quality and Value department were merged into the Marketing Research department's responsibilities, including the biennial orthopaedic census, additional ad-hoc studies and data requests that were managed by this group. The current Marketing Research department now serves the entire AAOS enterprise, and as such, the marketing research strategy has been updated to reflect a broader scope of work. In an effort to manage the frequency of surveys sent to Academy members, the following survey policy was created.

Planning specific strategic and programmatic market research initiatives results in a consistent, current, and shared understanding of the Academy's audiences and the competitive environment. This is accomplished through quantitative and qualitative techniques, as well as primary and secondary resources, to turn data into insights and recommendations to drive strategic business decisions.

2 Purpose

The purpose of this policy is threefold:

1. To manage the frequency of surveys sent to Academy members and stakeholders.
2. To establish criteria and processes for requesting market research and surveys.
3. To provide a clear and transparent policy.

3 Scope

This policy covers all surveys sent to Academy members on behalf of the Academy, including surveys sent by 3rd party or external organizations, except for Commercial Solutions surveys, which are not covered by this policy.

4 Definitions

Survey Fatigue

Survey fatigue is the negative impact on response rates due to over-surveying members.

Survey Types and definitions

1. Member led surveys. This means a survey request sponsored by an AAOS member for committee work, e.g. Work Environment survey for DAB, and other 3rd party requests from university settings with an AAOS member involved that has an interest in doing research or publishing.
2. Staff requested surveys. This means a survey request brought to the research team on behalf of staff who are working on new product development, customer experience work or any other topic that is connected to our strategic plan.

5 Member Security and Data Integrity

5.1 Ensure Security of Members' Data

Survey administrators must store data securely and use data only for the designated and intended purposes. Data containing confidential information (participant names, identifying information, email addresses, etc.) must be saved in an encrypted format on computers or drives of the AAOS, and this data should be disposed of when the survey is completed.

Only surveys serving AAOS goals are distributed to AAOS members. Third-party (e.g. other associations) surveys are not permitted. AAOS does not provide members' contact information to third parties, distribute third party's surveys to its membership, or provide raw data to external parties. AAOS staff/survey administrators must distribute surveys using the AAOS proprietary survey software to ensure data security.

5.1.1 Survey Software

"Free" survey software easily downloaded from the internet (example: Survey Monkey, social media-sponsored survey tools) are not allowed because of poor data security measures. Contact the Marketing Research Group in the Marketing Communications and Membership (MCM) department if you need help designing and distributing your surveys.

5.2 Ensure Data Integrity

The Marketing Research group within the MCM department works with the AAOS Department of Technology and Data Services in capturing survey data, cleaning, and storing it in the AAOS proprietary Association Management System (AMS) database. This ensures that all data gathered can be available to all staff so that all projects are cost-effective, efficient, and accurate.

NOTE: AAOS may use survey information for its internal purposes including but not limited to improving member benefits and communications with members. Surveys are not provided on an exclusive basis, but AAOS agrees that it will not use survey information for its own publication purposes prior to the requester publishing the survey information or within two (2) years of the request, whichever occurs first. JAAOS will have the right of first refusal for publications.

6 Survey Fatigue

To prevent "survey fatigue" (negative impact on response rates due to over-surveying members), it is recommended as a guideline that no more than 4 surveys are administered to a member per year. Surveys may not infringe on members' time at the annual meeting. Surveys must be administered at least two weeks before or after the annual meeting.

7 Time and Cost Efficiency

7.1 Time and Resource Dependent

Timing of the distribution of member surveys is an important factor in reducing survey fatigue. Whenever possible, the distribution of surveys across the year will be controlled by staff,

considering known timing of certain all-member surveys (e.g. member census, member value and satisfaction, nominating committee) as outlined in the Strategic Market Research Planning document timeline.

7.2 Cost & Resource Considerations

For cost-efficiency and resource allocation, it is imperative that the Marketing Research group be notified when a survey planned to be sent out to members is being considered. Data or resources may already be available for your planned surveys which will help you cut costs when doing your surveys.

8 Survey Request and Approval Process

8.1 Survey Request Process

A consistent survey request process must be followed, including request form submission:

- Contact the Marketing Research group to determine survey design, survey sampling, and reliability/validity check.
- Complete a survey request form and submit it to the Director of Marketing Research in advance of planned survey fielding. The Director of Marketing Research will review for accuracy and completeness and submit the request to the Subcommittee of Membership Council.
- If AAOS staff will not be conducting survey data analysis, the survey requestor needs to provide their analysis plan and resources when submitting the survey request.
- Subcommittee of Membership Council will review requests twice a year, at the end of January and at the end of July; submissions are due a month prior.
- Approved requests will be sent to the Membership Council; experts will be pulled in as needed.

8.2 Survey Approval Process

To be approved by the Subcommittee of Membership Council, survey research must align with the Academy's strategic objectives and provide high-quality, relevant information for AAOS.

9 Right to Modify Policy

The American Academy of Orthopaedic Surgeons reserves the right to modify this AAOS Survey Policy at any time. Changes and modifications will be effective when approved and posted.

10 Appendix – Marketing Research Request Form



The American Academy of Orthopaedic Surgeons Marketing Research Request Form

Name: _____

Date: _____

Application Checklist:

The following items must be contained in your application. Please be sure to complete all components of this form before submission.

*Please note, this form should be submitted **at least two-three weeks** before the survey can be administered.*

1. Please include the current draft of the survey and all invitation and cover letters, if available, as well as a statement indicating how the survey findings will be used.
2. Describe the survey project, including the purpose and intended use of results:

Project Name:	
Project Allocation Code:	
Brief Project Description (e.g. survey, focus groups, in-depth interviews):	
Alignment with AAOS Strategic Plan	
Committee Endorsing survey (Y, N, NA)	
Survey Objectives:	
Intended use of results/benefit to the Academy, (e.g. What decisions will be made with the survey results?)	

Is there an intention to publish research findings? Please provide brief details

3. Desired population to be surveyed (member group), including outgoing sample size if known:

Additionally, please attach email list of sample if available.

4. Target number of completed responses:

5. Survey Length (minutes and/or number of questions):

6. Method of survey administration (i.e. e-mail, mail or another method):

7. One-time (ad hoc) survey or multiple (longitudinal) surveys (Check one box)

8. Proposed date(s) for data collection:

9. What is your deadline for delivery of final research results? (Enter date)

10. Desired Marketing Research services

Check all that apply

Questionnaire design	
Coding	
Data analysis -Please specify analysis groups/member segments below _____ _____ _____	
Report writing	

11. If you were thinking of including a survey incentive, please describe here:

NOTE: Please be advised, AAOS may use survey information for its internal purposes including but not limited to improving member benefits and communications with members. Surveys are not provided on an exclusive basis, but AAOS agrees that it will not use survey information for its own publication purposes prior to the requester publishing the survey information or within two (2) years of the request, whichever occurs first.

To completed by AAOS Market Research Dept:

Survey development	
Revisions to Survey Questionnaires & Executive Team Review	
Final Questionnaires Approved	
Survey to Field (data collection)	
Survey Closed	
Data Cleaning (data prep, cleaning & coding) (4 weeks)	
Coding continued/Cross-tabs (2 weeks)	
Draft Report/Power Point Presentation (2 weeks)	
Final Report	