

# The STEP Project SURVEY TIMELINE

## 2018 STEP Global Survey Timeline

### **July 30-Aug 8:**

- Confirm Name of team contact for translations and confirm timeline for translations with teams
- Draft of case format and protocol
- Finalize instructions and consent language for survey
- Submit IRB for approval to Babson human subjects committee
- Testing of 3 surveys for time/flow in English and feedback from respondents
- Finalize instructions for common translation process; Finalize Survey in English (questions cut for time, survey final)

### **Aug 8:**

- Survey committee meeting 8 am EST
- Final survey to upload to Qualtrics

**Aug 9 -20:** Testing of English survey with select business families

### **August 21:**

- English survey to teams for translation and notify team contacts of process for translations
- Survey Committee Pre-test 3 languages and feedback

### **Aug 21-Sept 7:**

- Survey translations to be completed by teams
- Survey committee developing Academic Citation doc

**Aug 29:** Val Send translation reminder to teams

**Sept 7-15** Matt Allen to meet Babson Qualtrics team to finalize survey benchmarking results process

**Sept 8-Sept 15** – Upload translated surveys into System

**Sept 11:** Case format and protocol final by Survey Committee

### **Sept 16-Sept 21**

- Val send test link to each team and teams test translated surveys with family business.
- Test case protocol select businesses

**Sept 21-Oct 1:** Teams provide feedback to Val re any issues in their language in the survey.

**Oct 2-8:** Any corrections to translated surveys completed

**October 8-15:** Survey launched in all languages (individual teams can vary launch date but all will launch in October.)

### **Oct 8 –December 15**

- Data collection by all teams (analysis will take place as the date comes in, templates and macros for analysis can be created and re-used as more data comes in, this will facilitate more rapid data analysis at the completion of the survey)
- Val to send weekly updates to teams re survey data collected by team/country and post on website
- Primary case interviews completed (select cases will be completed after the analysis in order to answer specific questions)

**January 15-31:** Family Business respondents (that have provided contact info) will receive email to access to STEP website's Family Business Hub

### **January 15 – Feb 15, 2019**

- Primary data analysis conducted and sent to KPMG
- Post survey case/interviews completed on selected cases

**April 9, 2019 STEP/KPMG GLOBAL REPORT LAUNCHED**