



Survey Creation Checklist

jdcPartnerships

28 Knoll Road, San Rafael, California 94901

tel/fax 415.482.7839

info@jdcpartnerships.com



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TASKS	NOTES
Clarify	
<input type="checkbox"/> Be clear that a survey is the best approach <ul style="list-style-type: none"> • Data about a program can be gathered through a variety of means (i.e. interview, focus group). • Surveys can be a very expensive data collection method. • Consider how the survey will fit in the context of the whole data collection effort. 	
<input type="checkbox"/> Identify data sought <ul style="list-style-type: none"> • Clarify the questions are you trying to answer through the survey. • This information is crucial to focus your data collection effort. • Crucial at this step to think about the way you will analyze the data you collect. 	
Choose	
<input type="checkbox"/> Choose respondent pool <ul style="list-style-type: none"> • Does the target group really have the information you want? • What type of survey will be most “user-friendly?” • How can you phrase the questions so it makes sense for the target group? • Will it be easy for them to respond to each question? • How do you cover multiple perspectives? • Design varies greatly depending on target group. 	
Determine	
<input type="checkbox"/> Identify the specific domains you need information about <ul style="list-style-type: none"> • Decide between what is interesting and what is relevant. 	
<input type="checkbox"/> Decide on the specific questions you need answered <ul style="list-style-type: none"> • It may be that not all questions can be addressed through a survey. 	
<input type="checkbox"/> Get specific about your budget <ul style="list-style-type: none"> • Budget items include costs for survey creation, incentives (if there are any), data entry, data analysis. • Prioritize the best use of the resources you have to gather the information you desire. 	
<input type="checkbox"/> Decide on the best format <ul style="list-style-type: none"> • Electronic (online, email). • Paper (snail mail, turn-in/in person). • There are pros and cons for each type, evaluate which is the best match of resources and target group characteristics. • Consider how many questions to a page — too many or too few can bias results. 	
<input type="checkbox"/> Determine the details of your administration plan	



TASKS	NOTES
Ask	
<input type="checkbox"/> Design the questions carefully to get the desired info <ul style="list-style-type: none"> You can hold informal interviews during the design process to gather information about appropriate wording and/or response options. 	
<input type="checkbox"/> Ask one question at a time <ul style="list-style-type: none"> Keep wording of questions simple and single-focused. Confusing questions result in bad data. Avoid skip logic. 	
<input type="checkbox"/> Make choices mutually exhaustive & mutually exclusive <ul style="list-style-type: none"> Creating appropriate response choices takes a lot of work. Don't be afraid to go through many drafts. Confusing response choices results in bad data (and frustrated responders!) 	
<input type="checkbox"/> Limit open-ended questions <ul style="list-style-type: none"> It is much more complicated to analyze data from open-ended questions. 	
<input type="checkbox"/> Prevent implicit bias in questions <ul style="list-style-type: none"> Be cautious not to steer responders to particular answers. 	
<input type="checkbox"/> Use appropriate language and cultural references <ul style="list-style-type: none"> Phrase questions so that your responders will know what you are talking about. 	
<input type="checkbox"/> Pay attention to the sequencing of questions <ul style="list-style-type: none"> Be careful where you locate sensitive questions. Think about the flow of questions... Easier questions first, etc. 	
Pilot	
<input type="checkbox"/> Select respondents from across the target population <ul style="list-style-type: none"> Important that the pilot group is representative to ensure the survey is accessible to all potential respondents. 	
<input type="checkbox"/> Pretest for reliability and validity <ul style="list-style-type: none"> You may need to pilot the survey multiple times. 	
<input type="checkbox"/> Test for clarity of questions AND directions <ul style="list-style-type: none"> Crucial that your directions are clear. Can only know this through testing them. 	
<input type="checkbox"/> Incorporate feedback into the final draft <ul style="list-style-type: none"> Work seriously with the information received in the piloting process to ensure the final survey instrument is as clear as possible. 	
<input type="checkbox"/> Try to save data from pilot surveys <ul style="list-style-type: none"> If for format of the survey doesn't change too much you can extract/save the data from the pilot responses and use it in your final data analysis. If the pilot data is usable, don't have test-respondents take the survey again - you may need to develop a system for tracking this. 	
<input type="checkbox"/> Test survey on different computers, if electronic <ul style="list-style-type: none"> Important to test for technical issues as well as content issues. The survey should be accessible in both understanding and technology to your target population. 	

Survey Design Checklist



TASK	DUE DATE	RESPONSIBLE PARTY(IES)	NOTES/CONSIDERATIONS
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Design Specifics	
MAIL/HARD COPY	ELECTRONIC
<ul style="list-style-type: none"> • avoid skip logic! • Needs to be shorter than electronic versions 	<ul style="list-style-type: none"> • can use skip logic • can vary questions depending on differing demographics
<ul style="list-style-type: none"> • include “other,” “don’t know,” and “not applicable” response choices • space questions out • have CLEAR instructions • avoid leading and loaded questions • avoid built in assumptions 	
Response Rate	
<ul style="list-style-type: none"> • colored paper increase response rate • be sure to include self-addressed & stamped envelope • incentives help a lot” 	<ul style="list-style-type: none"> • important to use “spam reduction” strategies
Cost	
<ul style="list-style-type: none"> • relatively higher 	<ul style="list-style-type: none"> • relatively lower
Data Entry	
<ul style="list-style-type: none"> • need to think about data entry as part of design 	<ul style="list-style-type: none"> • much of data entry is automated

Question Types	
OPEN ENDED	CLOSED ENDED
<ul style="list-style-type: none"> • Memory questions • Subjective questions • Narrative questions 	<ul style="list-style-type: none"> • One answer • Multiple-choice • Categorical • Numerical • Ranking questions • Matrix-Rating scales • Likert scales • Semantic differential scales • Balanced v. Unbalanced scales