GUIDELINES FOR SURVEYS

When to Use Surveys

You might want to use surveys:

- When you need data from many people
- To gather client feedback or data about knowledge, beliefs, attitudes, and behaviors
- When you need demographic information from clients
- When it is important to protect the privacy of participants

Steps in Conducting Surveys

Step 1. Identify evaluation questions to be answered through surveys

Step 2. Determine what you are measuring

What you are measuring informs the types of survey questions you will ask as well as the response options associated with those questions. There are two kinds of variables you might measure in a survey:

- Observable or measured variables: Includes behaviors, practices, and skills
- Unobservable or latent variables: Includes goals, intentions, aspirations, and perceptions of knowledge, skills, or behavior

Step 3. Decide on open-ended or close-ended questions

Decide whether open-ended or closed-ended questions or a combination of both are best to collect the data you need to answer your evaluation question(s).

- Open-ended questions: Do not include fixed responses or scales but allow participants to add information in their own words

- Even though responses are open-ended, they may still be quantifiable (i.e., you can code responses according to categories and count the number that fall into each category)
- Several advantages: They are straightforward to design, ensure that respondents are not influenced by response categories, provide rich, in-depth information, and may help you collect more meaningful information because respondents can provide detailed responses
- Surveys with too many open-ended questions could overburden respondents and contribute to lower response rates

- Close-ended questions: Include fixed responses such as yes or no, true or false, multiple choice, multiple selection, or rating scales
    - Several advantages: They are straightforward to process and code, with less room for error, limit irrelevant or vague information, place a low burden on respondents to answer, and may contribute to high response rates

Step 4. Determine the response scales and number of response options for close-ended questions

- If you decide to include close-ended questions on your survey, choose which type of scale to use for responses
    - If you want to know whether a certain characteristic or phenomenon exists, consider using a yes/no or true/false scale
    - If your focus is on agreement, frequency, importance, likelihood, quality, or satisfaction, consider using a rating scale
- Also consider how many response options to include for close-ended questions
    - As a rule of thumb, do not include more than 7 response options in a rating scale; 5 options are usually sufficient

- Also consider whether a midpoint in a rating scale is necessary
    - A rating scale with an odd number of response options, such as 5, has a midpoint, so respondents can select that midpoint to remain neutral or undecided on a question
    - Respondents might also select the midpoint because it is the easy option and they don't have to consider the other options, as they would have to if there were an even number of response options, like 4

Step 5. Ensure the language is clear, culturally relevant, and developmentally appropriate

By ensuring the language in your survey is clear, you'll likely increase the response rate because respondents will be able to easily understand and complete the survey

- Survey questions should be relevant and culturally and developmentally appropriate to your evaluation question(s)
    - Use language that is appropriate for your audience so they can understand what they are asked
    - Questions should also be brief and avoid wordiness
- Response options should be mutually exclusive and exhaustive so respondents can choose only one response:
    - Mutually exclusive means two response options cannot be true at the same time
    - Exhaustive means the response options include all possible responses to a question
- Avoid:
    - Double-barreled questions (i.e., a question that asks two questions but forces respondents to provide only one answer)

- When a question includes a conjunction such as “and,” “but,” or “or,” it is often a double-barreled question

  - Loaded questions (i.e., a question that may lead respondents to answer in a way that does not represent their actual position on the topic)
  - Ambiguous words (e.g., usually, often, rarely)

Step 6. Make the survey readable

Consider:

- Visually separating survey questions
  - Number questions
  - Label response options
- Your audience when choosing a font size
  - Should be large enough that all respondents can read the survey questions and response options
- Thanking participants for their time at the beginning and end of the survey so they know their time is appreciated

Step 7. Decide on an order of survey questions

Always be sure to arrange your questions in a logical order.

- Your survey should start with straightforward questions related to, for example, respondents’ background, experience, or general perceptions
- The first few questions should also capture the attention of respondents so they stay engaged throughout the survey
- Try to put the most important questions at the beginning to collect the most useful information before respondents become fatigued
- Then ease into more controversial or challenging topics near the end

Step 8. Share important information with respondents

When respondents know important information upfront, they are more likely to complete the survey.

- Think about sharing relevant information related to the survey in an invitation letter, e-mail, phone call, or at the beginning of your survey instrument with respondents
- Explain why the data are being collected so that respondents understand the reason for the questions
- Include information about:
  - The approximate time to complete the survey
  - The confidentiality of results and anonymity of participation
  - The deadline for completing the survey, if relevant
  - Contact information for respondents who have questions about the survey or results

Step 9. Select a mode for administering the survey

- Can use a variety of modes (e.g., collect phone numbers and call participants, send participants a link to an online survey in a text message or e-mail, or print the survey to mail to participants or administer in group)
- Modes vary in cost, time commitment, and number of staff needed.
- Modes may also yield different response rates
  - Survey response rates may be as low as 15 to 40% if, for example, the intended participants find it difficult to participate in the mode chosen
  - The National Center for Education Statistics recommends a response rate of at least 85% to assume responses represent the entire population

Step 10. Pilot test and conduct the survey

Note. This handout was adapted from the following sources:

An Educator's Guide to Questionnaire Development, by the Institute of Education Sciences (2016). https://ies.ed.gov/ncee/rel/regions/central/pdf/CE5.3.2-An-Educators-Guide-to-Questionnaire-Development.pdf.

Data Collection Methods for Program Evaluation: *Questionnaires,* by the U.S. Department of Health and Human Services Centers for Disease Control and Prevention (2018). https://www.cdc.gov/healthyyouth/evaluation/pdf/brief14.pdf.