Basic Guidelines for Developing and Conducting Surveys

Should you conduct a survey?

Surveys are an assessment method where descriptive data about attitudes, behaviors, opinions, and values of an individual are collected. Surveys come in many different forms (web, phone, mail, etc.) and can include different question types.

1. **Articulate the purpose of the survey.**

Have a clear purpose to ensure your survey provides data that will help you answer your questions and make decisions. It is also easy to start asking questions about things you'd **like** to know versus asking what you **need** to know. Keeping your purpose in mind will help you ask only essential questions. Fewer, concise questions and a shorter survey is the goal to achieve the greatest response rate and reduces survey fatigue.

2. **Create a survey introduction for participants using the following information:**

   - Organization conducting the survey
   - Purpose of the survey
   - Value of participating
   - Confidentiality or anonymity of the survey
     - Responses considered confidential are those that can be traced back to a unique identifier, such as a student's ID number or e-mail address. The data collected is only reported in aggregate form.
     - Responses submitted anonymously cannot be traced back to a specific individual.

3. **Determine the question sequence i.e. introductory questions, grouping related questions, using filtering questions, etc.**

4. **Develop the survey questions. As you develop the questions ask yourself the following:**

   - Will the questions provide the data you need to answer your questions or make decisions?
     - *Closed-ended questions* provide a fixed list of responses and ask participants to select one or more options.
     - *Open-ended questions* have no pre-existing response categories. Although more time consuming for participants to complete and more difficult to analyze, open-ended questions can provide valuable insights into participants' perceptions.

- Are all the questions consistent with the objectives of the survey i.e. are there redundant, irrelevant, or unnecessary questions?
  - Consider the wording of your question to keep it clear and to the point.
  - Questions that address multiple topics and are vague will not result in usable data.
- How will the data be used? Develop an action plan for utilizing the data.

5. **Limit the survey length. Surveys should be as concise as possible while still meeting the objectives of the survey. Online surveys should take respondents less than 15 minutes to complete.**

6. **Have multiple constituents proof the survey.**

7. **Ask if You Need IRB Approval**
   - Surveys whose data is intended to be used for quality assurance/quality improvement of a program or service do not require IRB approval.
   - IRB approval is required for projects that fall into the research category and aim to test a hypothesis. The Human Subjects Research Determination (HSRD) form collects the information that an IRB Chair would need to make a determination about whether the project needs IRB approval.

8. **Pilot the survey with individuals similar to your target population.**

9. **Decide on a census or a sample.**

   - When you survey the entire population, you are conducting a census.
     - We often have access to an entire population i.e. everyone who participates in a program or event.
   - When utilizing a sample, you are surveying a smaller subset of the population.
     - If your intended population is too large, then you probably need to select a sample. A strong sample allows us to make generalizations about the larger population based on the survey results. If you require assistance in determining or selecting a sample, contact Teri Schnelle, Associate Director for Assessment, Improvement, & Research.
   - In choosing a census or sample you need to ask the following questions:
     - How much will it cost to survey X number of people? How much time do you have for data collection? Who is going to process and analyze the data? Constraints of time, budget and other resources need to be considered.
     - Identify the target population. In this step you need to be as specific as you can in defining the characteristics of interest of your target population (i.e. year, age, gender, living situation, etc.).
     - Get a list of the target population. Be aware of the possibility that this information might be stored in different offices around campus and not necessarily integrated into a unique database or system.

10. **Plan your reminders to increase your response rate.**

In the case of web or e-mail surveys, a good response rate will be related to the number of contacts that you make. Some guidelines for planning reminders are outlined below.

- When sending a survey to the entire student population, it is very useful to have a recognizable university authority to send out an e-mail announcement explaining the importance of the study.
- When sending a survey to smaller populations of students i.e. those who participated in an event, it is helpful to send the e-mail from your department's e-mail address.
- The initial e-mail invitation should include a description of the study and the web link, and it should be followed by a couple of short e-mail reminders.
- It is best to send the reminders after you see a significant decline in responses.
- In the case of non-respondents, send follow-up e-mails at different days and times than the original message.

11. Think about utilizing incentives.

Incentives can be an effective strategy to increase the number of respondents to your survey. The considerations below can help you when thinking about providing an incentive.

- The incentives that you use must be appropriate for your audience and should match the amount of effort the participant spends on completing the survey.

  - Pre-paid, one per participant incentives, result in highest return compared with promised incentives i.e. lottery.
  - Money is more effective than a gift (equal in value), and the more burdensome a survey is, the more effective incentives are.
  - Incentives, especially money and gift cards, may have an impact on a student's financial aid package. Make sure to inform students of the potential impact and to notify the Office of Financial Aid about the amount received.