Survey Design: Basics and Best Practices

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Surveys that people will complete

Humans tend to operate on a ‘conservation principle’ – we aim to expend as little cognitive energy as possible!

- Questions should be easy to answer
- Measures should be taken to mitigate survey fatigue
Survey fatigue occurs when respondents become overwhelmed with the questions or number of surveys that they are asked to take.

Survey fatigue not only reduces response rates, but it also compromises the quality of the data that respondents provide – they have become bored or tired of answering survey questions.

Surveys that people will complete

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Survey Planning & Design

Respondent Experience

End Goal: Good Data

Premise

Surveys that people will complete

People tend to operate on a ‘conservation principle’ – we aim to expend as little cognitive energy as possible!

→ Questions should be easy to answer
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Quality data

A survey’s usefulness rests on the quality of the data it produces

→ Accurately reflects participants’ experience
→ Speaks to questions of interest
Groundwork: Survey Planning

✧ Carefully define the purpose of the survey
✧ Identify the core questions to be answered
  ✧ The clarity of these questions determines the usefulness of the data that will be gathered
  ✧ Must be precisely defined
  ✧ Answerable with survey data
  ✧ Resist the urge to stray from the core purpose of the survey!
✧ Identify the population of interest and the respondents that can provide the necessary information
✧ Check to see if there are any validated surveys available that already address these questions – if not, you’ll need to create your own survey
Writing Good Questions

Scope of survey questions:

<table>
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<tr>
<th>Characteristics</th>
<th>Attitudes</th>
<th>Experiences</th>
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<tbody>
<tr>
<td>• How old are you?</td>
<td>• How satisfied are you with your social life at Lehigh?</td>
<td>• Have you ever seriously considered transferring?</td>
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<tr>
<td>• What is your race/ethnicity?</td>
<td>• How comfortable are you with the campus climate?</td>
<td>• Which of the following activities did you participate in during your senior year?</td>
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Good survey questions:

◊ Are specific and precise
◊ Are clear and easy to understand
◊ Require minimal effort to answer
◊ Are closely connected to the purpose of the survey
Writing Good Questions

Types of questions to use frequently
- Likert-scale
- Categorical

Types of questions to use sparingly
- Open-ended
- Multiple-response

4. Overall, how satisfied have you been with your undergraduate education at Lehigh?

22. If you could pass along one piece of advice to future Lehigh students, what would it be?

28. With which academic college are you primarily affiliated at this time?
- College of Arts & Sciences
- College of Business & Economics
- P.C. Rossin College of Engineering and Applied Science
- Intercollegiate Program

8. Which of the following describes the kind of experiences you had at Lehigh (SELECT ALL THAT APPLY)
- I explored my full potential
- I pursued my personal goals
- I built my own future
- I developed as a leader
- I thrived socially
- I thrived academically
- I enhanced my existing strengths
- I enhanced my career potential
Writing Good Questions: Likert-Scale

◊ Consider using an odd number of response options with a neutral middle-ground

◊ Be consistent with response options throughout the survey
  ◊ At the least, use the same number of response options
  ◊ Going the same direction - ideally negative-to-positive

◊ Consider including a “Not Applicable” if relevant (or “Prefer not to answer” for sensitive questions)
Writing Good Questions: Categorical

- Answer options should be exclusive and exhaustive
  - Watch out for overlapping response options

- Consider including an “other” option with text-entry
Writing Good Questions: Open-ended

✧ Open-ended questions should be used sparingly
  ✧ Are taxing to respondents
  ✧ Require additional time investment to code

✧ However, they elicit rich data and can be very valuable
  ✧ It’s best to include 1-2 open-ended questions at the end of the survey
  ✧ They provide opportunities for respondents to express anything they want to share
Writing Good Questions: What to Avoid

✧ Double-barreled questions
  ✧ Watch out for “and” “but” “or”
  ✧ Split any compound questions into separate questions

✧ Loaded questions

✧ Leading questions

✧ Acronyms, abbreviations, and jargon

Do you have a budget and did you stick to it over the last week?

Where do you like to party?

How easy was it for you to arrange a time to meet with your faculty mentor? Keep in mind that faculty often advise more than 45 students each.
Writing Good Questions

◊ Be as precise as possible
◊ Specify exactly what you’re inquiring about
◊ Consider specifying a time frame

**Poor questions**
- Which of the following activities did you participate in?
- Who helped you the most during your college career?

**Better questions**
- Which of the following activities did you participate in during your senior year?
- Name the faculty or staff person at Lehigh who has helped you the most in your college career.
Writing Good Questions

- Verify that the survey is mobile-friendly and questions can easily be completed from a cell phone
- Ensure that there are no unnecessary questions
  - Only include questions directly related to the purpose of the survey
  - Consider other means of gathering demographic information
- Use branching/display logic so that respondents don’t have to answer questions irrelevant to them
- Consider adding reminders to complete unanswered questions (but don’t force respondents to answer questions!)
Writing Good Questions

- Have someone else take the survey to proof questions

- **Bonus tip:** do a pilot/test run – collect a couple of responses then take a look at the data
- Check for any issues with items or formatting that would cause problems with analyses
- Pay attention to question names/labels as building this in early-on is often helpful
Strategies to Increase Response Rates

- Consider incorporating the survey into other activities
- Offer incentives
  - Appealing incentives:
    - Token gift for all respondents
    - Something respondents aren’t able to get for themselves
    - Something very expensive
  - Less appealing incentives:
    - Single item with low odds of winning
    - Things most respondents already have
Strategies to Increase Response Rates

- Send invitation from a known, trusted source
- Provide a “why” (but keep it brief!)
  - Why participation is important
  - How responses will be used
- Offer assurances of privacy
  - Confidentiality encourages honest responses
  - Be careful if promising anonymity
  - See guidelines from Institutional Review Board (IRB) on confidentiality
Strategies to Increase Response Rates

◊ **Provide information about the survey timing**
  ◊ Time to complete (hopefully short!)
  ◊ Deadline

◊ **Send reminders**
  ◊ 1-2 reminders about 1 week apart
  ◊ A final “last chance” reminder
    ◊ Unique subject line
    ◊ Reiterate importance and deadline to complete survey
Strategies to Increase Response Rates

- Select launch dates strategically
  - Avoid:
    - Breaks/holidays
    - Exams
    - Weekends
    - The beginning/end of a semester
  - Avoid overlaps with other surveys
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<td>May 1, 2020</td>
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For more information about a survey, hover your cursor over its block. Only recurring, large-scale (going to 500+ students) surveys are displayed here. Dates are approximate.
Strategies to Increase Response Rates

✧ Select launch dates strategically
  ✧ Also avoid:
    ✧ Breaks/holidays
    ✧ Exams
    ✧ Weekends
    ✧ The beginning/end of a semester
  ✧ Avoid overlaps with other surveys:
  ✧ Take organization-wide measures to reduce survey fatigue
  ✧ Ensure survey is designed with the respondent’s experience in mind

OIRSA.Lehigh.edu/survey-services
Final Thoughts

- Document **everything** for future reference
  - Recruitment procedures
  - Instrument & scoring key
  - Response rate

- Utilize the data you collect to its full potential: analyze and disseminate survey findings
Feel free to contact me with any questions!

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Sources:
Do’s and Don’ts in Survey Design and Reporting, Association for Institutional Research webinar
Conducting a Quality Research Project, Association for Institutional Research webinar
Writing Survey Questions, Percontor workshop