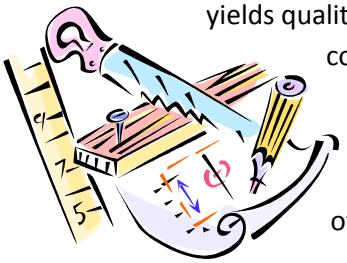
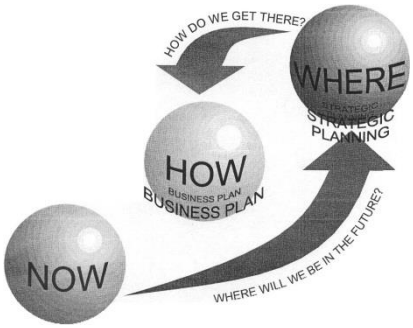
Survey Guidelines

Designing, administering, and analyzing surveys is a surprisingly complex process. Ensuring your survey yields quality data requires an in-depth understanding of survey design and construction, reporting, and analysis. Below are several tips to consider when planning and designing a survey. Keep in mind, many research questions can be answered without conducting a survey. Consult with Institutional Analysis prior to deciding to implement a survey to see if other data exists that would address the purpose of the survey.



Planning:

- Write out your research purpose, goal, or question being addressed. Conduct a literature review to help focus your research questions. It is important to identify the stakeholders of the survey. In the end, survey results should be shared with the stakeholders.
- For every question, you should be able to answer "Why do I need to know this?" When creating survey questions, take the time to review survey instruments that have already been created, tested, and used. There is no guarantee that existing instruments are reliable, but they may help to structure questions. Before using existing surveys, request permission from the organization or researcher that created the survey. Consider conducting a pre-test of the survey instrument. Conducting a pilot with a small group is an excellent way to generate feedback on the survey instrument.



- Before conducting the survey, consider any administrative issues. This may include issues around the cost to conduct the survey, facilities to deliver the survey, time taken to administer and analyze the survey, personnel required to conduct the survey, and overall feasibility of the survey.

Designing:

- It is important to consider who will be completing the survey. Identifying and surveying all subjects in a population is called a census. In many cases, a census is not possible and a sample must be taken. In deciding whether to use a census or a sample, consideration needs to be given to precision and cost. Large samples are more accurate but more costly. There is also a point of diminishing returns with size. More favourable results can often be achieved by focusing on improving response rates rather than increasing sample size.

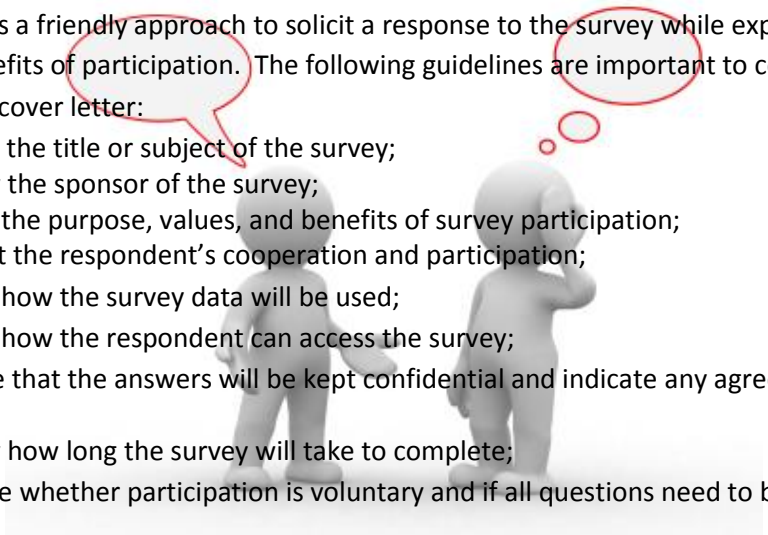
- Selecting the appropriate survey modality is critical in designing the survey. Several different types of modes exist including email, web-based, telephone, mail, and in-person surveys. More than one mode may be appropriate for the survey. Web-based surveys are quickly becoming

the preferred mode due to their low cost; however, non-electronic surveys may improve response rates and are an effective tool as a final reminder.

- Be aware of your timelines when designing a survey. It is important to know the date by which the survey results need to be interpreted. Determine if there is a time period when you are more likely to get responses. For example, students and faculty are more likely to respond to surveys sent out early in the semester. Does the survey take place on a regular cycle? If so, the specific time period related to your data may also be an important consideration. It is also important to determine the number of times you plan to contact survey recipients. The Association for Institutional Research's Data and Decisions Academy provides the following suggested subject contact table:

			Schedule	
Contact		Goals	Electronic	Mailed
1	Pre-notice	Appeal for help, say when and how the questionnaire will arrive, say what it is about, and stress the importance of the response	Day 1	Day 1
2	Invitation	Survey distribution (email or mail)—detailed cover letter, token of appreciation (where possible), and mention of short amount of time	~Day 3	~Day 5
3	First follow-up	Follow-up reminder via post card or friendly email	~Day 7	~Day 12
4	Replacement survey	Provide another copy of the survey with another, differently worded letter	~Day 10	~Day 20
5	Final contact	If possible, use a different mode of delivery	~Day 13	~Day 30
	Data collection ends	For online, survey is taken down	~Day 14	

- The cover letter or invitation to participate in the survey serves several purposes. Most importantly, it is a friendly approach to solicit a response to the survey while explaining the values and benefits of participation. The following guidelines are important to consider when developing the cover letter:
    - Provide the title or subject of the survey;
    - Identify the sponsor of the survey;
    - Explain the purpose, values, and benefits of survey participation;
    - Request the respondent's cooperation and participation;
    - Explain how the survey data will be used;
    - Explain how the respondent can access the survey;
    - Indicate that the answers will be kept confidential and indicate any agreements to share data;
    - Identify how long the survey will take to complete;
    - Describe whether participation is voluntary and if all questions need to be answered;



- Identify any personal information collected in the survey and how it will be used, disclosed, and protected;
- Describe any token of appreciation that will be offered and how it will be distributed;
- Describe whether anonymity can be guaranteed; and
- Describe how information collected from the survey will be shared, disseminated, stored, and destroyed.

- When designing survey questions, consider the analysis that will be conducted after the surveys are completed. Will you be summarizing your data using simple descriptive statistics or will you be drawing inferences from your data? The latter will require a more sophisticated set of survey questions with dependent/independent variables to perform regression analysis. Also, take into consideration whether questions will be closed or open ended. Open-ended questions require considerable time to analyze the results; however, they provide more opportunities for the respondent to elaborate on the topic. Closed-ended questions are easy to construct but might be too restrictive or misleading. Be sure to consider the length of the survey and be cognizant of the respondent's time. After about 15 minutes, the respondent will lose interest, which may impact the quality of the results. The Association for Institutional Research's Data Decisions Academy developed the following general guidelines for collecting quality data:
    - Directly relate each item to the research problem, question, or hypothesis and ensure each item is actionable;
    - Address a single issue per item;
    - Avoid biased and misleading questions;
    - Develop objective questions;
    - Ensure the questions are clear;
    - Be culturally sensitive;
    - Develop unambiguous questions;
    - Provide a mix of question type;
    - Ensure the response items fit the intent of the question;
    - Sequence the items on the survey with care;
    - Carefully choose the demographic questions;
    - Include comments or open-ended/free-text questions; and
    - Provide clear survey instructions.

If you require further guidance on survey design, please visit the Statistics Canada website provided below or contact Institutional Analysis.

Sources

Data & Decisions Academy. Survey Design. Tallahassee: Association for Institutional Research, December 2010. Pp 3-63.

http://www.statcan.gc.ca/pub/12-587-x/12-587-x2003001-eng.pdf Statistics Canada, 2003.