

## Survey Development Checklist

### Identify the purpose of the survey.

- What information or data do you want or need to know?
- What inquiry or research questions do you want to be answered?
- Is a survey the best way to answer your questions, or can you get the data more reliably from other sources?
- State the purpose of your very clearly and directly and be prepared to share the purpose with all interested parties.

### Whom will the survey be administered?

- Who is the best source of information for the questions you want answered?  
Different stakeholders will likely respond differently to questions based on their roles.

### How many people will you ask to complete the survey?

- Who composes the population you want to get information from?
- Can you reasonably disseminate your survey to the entire population? If not, what is the demographic breakdown of the population? Can you identify and access a representative sample that you can ask to complete the survey?
- If you use a representative sample, how will you ensure your sample is representative?

### What is the time frame for this survey from start to finish? Build a survey calendar, starting with the date a summary report is needed, and a “backward plan” to identify all the steps along the way. Consider

- Time to build your survey questions with input from interested parties
- Time to build your survey in the format of choice (e.g., paper-pencil, online) with time to edit.
- Time to tryout your survey with a small sample of the population to be surveyed and collect their feedback
- Time to build your dissemination plan (how will you administer the survey?)
- Time for the survey administration window
- Time to collect, clean, and analyze survey data
- Time to summarize and report survey results

☐ **Organize a ‘survey development team.’** Gather the interested parties who intend to use the survey results. Consider

- What do they want to know?
- Do they have specific questions in mind?
- What can they tell you about the people completing the survey?
- Can the team facilitate access to the population to be surveyed?

☐ **Build survey questions,** and ask for feedback from the survey development team regarding the format, flow, visual aspects, etc. Consider

- Item format
- Closed- or open-response items
- Scale item responses
- Changing open-response items into closed-response items by pre-populating a list of common or suspected responses with an “other” option available
  - Open-response items take a long time to analyze, so use them sparingly. Instead, develop close-response items as much as possible.
- Use branching, skip, or other logic as necessary to minimize the time it takes for respondents to complete the survey

☐ **Determine the demographic variables for disaggregating results.** Only ask demographic questions when you can clearly describe why you want to know this personal information from the respondent. These questions can be challenging to write, are potentially off-putting or offensive, and should only be asked on a need-to-know basis. Discuss these questions carefully with your survey development team and carefully research the least restrictive wording.

- **Gender.** Note that gender, sexual identity, sexual orientation, and sex at birth are different aspects of questions about gender. Research the best formatting and wording and ask for this information thoughtfully and carefully.
- **Ethnicity/Race.** Race is a social construct that is not based on scientific evidence. The government defines ethnicity/Race for census purposes and refers to the respondent's cultural, historical, and sometimes political background. The ethnic/racial groups identified on U.S. census forms are limiting as they tend to be very general. Consider the multiple countries on the Asian continent, or the wide variety of indigenous tribes in North America, for example. Identify the possible ethnic groups in your population and ask individuals in those groups for feedback on how to represent their cultural group(s) in this type of question.
- **Age.** If age is an important question, pre-populate age ranges or ask for grade level instead if students are being surveyed.

- Disability. This would only be asked for unique purposes, which should be made very clear to the respondent how this information will be used. Do not ask this of children, as these data can be collected from the school.
- Income. If income is an important question, pre-populate income ranges. Do not ask children about parental income.
- Religion. Do not ask children this question. Do not ask adults unless there is a justifiable reason to do so.
- Illicit or illegal drug use. Do not ask children this question. Do not ask adults unless there is a medically justifiable reason.
- Sexual activity. Do not ask children this question. Do not ask adults unless there is a medically justifiable reason.

**Determine the format for the dissemination of the survey** (e.g., paper-pencil, electronic).

**Determine the analyses that will be used** to be able to answer the questions in the stated purpose of the survey to ensure all necessary variables are being collected.

- Remember, correlation does not mean causation. Two variables may be related or correlated, but one may not necessarily cause the other unless additional data supports that conclusion.
- Identify the software or technical support you may need to conduct the analyses. Ensure those tools or people know your need and schedule the time to complete the analysis so your data is ready when you need it.

**Build the survey in the selected format.**

**Ask a small, representative sample of the population to be surveyed to “try out” your survey and provide feedback.** Ask them:

- Are the directions and questions easy to understand?
- Are there any missing response choices based on your personal experiences with the topics in the survey?
- Are there any gaps in the questions on the survey that should be addressed?
- Do the demographic questions encompass all potential respondents?
- Is there anything offensive in the survey or exhibits bias, stereotypes, or misconceptions?
- Is there anything in the survey that gave you concern?
- Did the mechanics of the (electronic) survey work as expected?
- How long did it take you to complete the survey?

- Convening a group of reviewers representing the diversity of the population being surveyed or specific cultural navigators who can inform how various respondent groups will receive your survey.

**Do accommodations need to be considered for those completing the survey?** Consider

- The overall language of the survey. Is the language appropriate in both content and complexity for the target population? Have technical words been defined or eliminated? Have reading levels been considered for new or young readers?
- Does the survey need to be translated? Providing translated options will ensure equitable distribution and access if the survey is administered to anyone with English as a second language. In addition, ensure all supporting materials are also translated.
- The respondent's access to a computer, tablet, or smartphone
- Your access to email addresses or mailing addresses
- The amount of time it will take a respondent to complete the survey
- Your survey may need to be administered with multiple format options to accommodate the needs of your respondents and increase the response rate

**If available and needed, connect with your Institutional Review Board** to approve your survey as a part of human subjects research.

**Write an opening letter/note to the survey respondent.** This opener should inform the respondent of:

- The intended purpose(s) of the survey
- How the survey results will be used and reported, including information that motivates the respondent to participate
- If their responses will/will not be anonymous
- How many minutes it will take them to complete the survey
- Assurance that their responses won't be used for any other purpose
- Assurance that they can leave the survey at any time and can ask to have their responses removed from the response pool
- Whom to contact (provide name, phone number, and email address) if they have questions about the survey
- A statement of thanks for their time