Creating Effective Surveys

Roundtable: Monday, October 7, 2013 (11:45-1:00) - Continental Ballroom
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Note. The information in this document was compiled using many different sources and personal experience creating surveys. If you wish view the sources, please visit the link at http://em.georgiasouthern.edu/osra/wp-content/uploads/sites/5/SAIR-Memphis_Roundtable_Handout_SourceReferences.pdf. Also, an electronic version of this document is available on the web at http://em.georgiasouthern.edu/osra/about/staff/sair-2013/.

Introduction

There are many different types of surveys such as, phone, face to face, mail, web, etc. The most common purpose of surveys in Institutional Research is for assessment. The six steps highlighted in this document can be used by institutional researchers to create effective surveys.

Note. Always have surveys approved by department and IRB (http://www.georgiasouthern.edu/research/orssp/compliance_irb.htm), if required.

Step 1: Identifying the Survey Audience

- **Who am I going to interview?** Parents of students, beginning freshmen, transfer students, etc. This group is your target population.
- **Determine sampling method(s)** - probability or nonprobability.
  - **Probability** - each member of the population has a known non-zero probability of being selected. Probability methods include random sampling, systematic sampling, and stratified sampling.
  - **Nonprobability** - members are selected from the population in some nonrandom manner. These include convenience sampling, judgment sampling, quota sampling, and snowball sampling.
- **How many people am I going to survey?** See page 4 for information on determining sample size. Also, consider over sampling if there are previous response rate data that show low response rates from certain groups within target.
- **Which type of survey do I need?** Web, phone, mail, or face to face interview. It’s up to you to determine which type of survey fits your needs.

Example Sampling Methods are defined below

- **Random sampling** is the purest form of probability sampling. Each member of the population has an equal and known chance of being selected.
- **Systematic sampling** is often used instead of random sampling. It is also called an Nth name selection technique. After the required sample size has been calculated, every Nth record is selected from a list of population members.
- **Stratified sampling** is commonly used probability method that is superior to random sampling because it reduces sampling error. A stratum is a subset of the population that shares at least one common characteristic.
- **Convenience sampling** is used in exploratory research where the researcher is interested in getting an inexpensive approximation of the truth.
- **Judgment sampling** is a common nonprobability method. The researcher selects the sample based on judgment. This is usually an extension of convenience sampling.
- **Quota sampling** is the nonprobability equivalent of stratified sampling. Like stratified sampling, the researcher first identifies the strata and their proportions as they are represented in the population.
- **Snowball sampling** is a special nonprobability method used when the desired sample characteristic is rare. It may be extremely difficult or cost prohibitive to locate respondents in these situations.
Step 2: Designing the Survey

- State the intentions of the survey with a lead-in paragraph. If incentives are used, you can include a statement in the lead-in paragraph.
- Identify the type of questions needed. Always keep questions short and simple. Also, keep the number of questions to minimum.
- Include instructions with questions. For example, check all answers that apply.
- MAP out the flow of the survey. Surveys should flow in a logical way.
- Always keep the stakeholders (party who has interests in the project) involved in the design process.

Note. My office also uses a survey checklist, which documents information about Qualtrics survey software. Please refer to the link on page 4 of this document to see the “Qualtrics Knowledge Document and Checklist for Survey Creation”.

Things to Keep in Mind

- Confidentiality versus Anonymity
  - Confidentiality - Individual survey respondent’s information can be identified, but the information is not released to the public.
  - Anonymity - No identifying information about survey respondents are collected.
- Never ask for any personal information (name, address, age, phone, etc.) unless needed. If you need to ask for personal information, always include a confidentiality statement.
- Ask only one question at a time (avoid double-barreled questions).
- Always have someone in the office and the stakeholders review the survey questions and provide feedback.
- Always include no response/opt out for open ended type questions.
- Keep the survey short as possible.

Step 3: Creating the Survey

- This step involves adding the survey questions, lead-in paragraph, etc. from the design phase (see step 2 above) into a survey software tool.

Note. There are many different types of online survey software tools such as, SurveyMonkey, SurveyGizmo, Zoomerang, IBM survey software, etc. The type of software used at Georgia Southern University is Qualtrics survey software. See the web at http://www.qualtrics.com/ for additional information about Qualtrics.

Things to Remember

- Organization is the key.
- Break questions up into multiple pages (avoid creating a long one page survey).
- Avoid weird color schemes (keep it plain and simple).
- Include office contact information (email and phone) in case of questions.
- Always include a thank you page at the end of the survey.

Example of a survey lead-in paragraph is below.

The Student Affairs & Enrollment Management (SAEM) Professional Development Council (PDC) planned and provided support for the annual Holiday Luncheon on December 11, 2012 in the Nesssmith-Lane Conference Center Southern Ballroom. The event was funded in part by the PDC Foundation and the Office of the Vice President for SAEM. All SAEM Professional and Support Staff were invited to attend. The PDC is seeking feedback from SAEM staff who attended the Holiday Luncheon. Please take just a few moments to complete this survey. Thank you.

Example of a survey incentive statement is below. This statement can be included in the survey lead-in paragraph and survey email invitation.

By completing this survey, you will be entered into a drawing for a $10 gift card. Ten survey respondents will be randomly selected to receive a gift card.

Example of confidentiality statement is included below highlighted in yellow.

Note. The confidentiality statement highlighted in yellow can be included in the survey intro paragraph and survey email invitation.

The Student Affairs & Enrollment Management (SAEM) Professional Development Council (PDC) planned and provided support for the annual Spring Fling on Wednesday, April 24, 2013 at the Recreation Activity Center (RAC) Pavilion. The event was funded by the PDC Foundation. All SAEM professional, support staff, and graduate assistants were invited to attend. The PDC is seeking feedback from SAEM staff who attended the Spring Fling as well as those who chose not to attend. Your responses will be kept confidential and no personally identifiable information will be reported. Please take just a few moments to complete this survey. Thank you.
Step 4: Testing the Survey
- Send to everyone in the office to review and provide feedback.
- Send the survey to stakeholders for review and approval.
- Take the survey to time its length.
- Always download and check feedback results to make sure they are no glitches in the survey software.
- Conduct a pilot test using a very small population sample. A pilot test is useful to evaluate how a sample of people from the survey population responds to the questionnaire.

Step 5: Launching the Survey
- This step involves launching the survey through email, social network sites, or on the web.

Note. My office typically sends out survey links through email. Below are a few strategies on emailing surveys.

Tips for Emailing Surveys
- Write an effective survey email invitation.
  - Subject lines should be short (avoid words that trigger SPAM filters such as, “free” or “important message”).
  - Explain the purpose of the survey.
  - Thank the recipient in advance for their participation and assure confidentiality of their responses.
- Always mention the survey deadline and how long the survey will take to complete.
- Send a reminder email (to those who have not completed the survey) typically 2 weeks after the original survey email.
- Include the survey URL and instructions for accessing the survey.
- Give incentives such as, prize giveaways, gift cards, etc. to boost response rates.
- Include office contact information (email and phone) in the email invite.

Example of an email invitation is below.

From Name: Campus Recreation and Intramurals
Reply To Email: SRASurveyResponse@georgiasouthern.edu
Subject: Complete the CRI Intramural Dodgeball Survey for a Chance to Win Prizes, Participate by September 27, 2013

Thank you for participating in our Intramural Sports programs this semester. In our efforts to learn how to more effectively serve you, we are sending you a web-based survey (link below). We are seeking your feedback by Friday, September 27th. This survey should only take 5-10 minutes to complete. Your responses will be kept confidential and utilized for guiding Campus Recreation and Intramural’s efforts in improving Intramural Sports programming.

By completing this survey, you will be entered into a drawing to win Intramural Sports prizes or a free sport entry fee. Ten survey respondents will be randomly selected to receive a prize.

Thank you for your participation. Please visit: (~SurveyLink Goes HERE~)

If you have any technical questions regarding this Evaluation Form, please contact Strategic Research and Analysis at 478-5218 or by email at sraoffice@georgiasouthern.edu.

Step 6: Analyzing Survey Results (Interpreting and Reporting)
- Examples to analyze survey data are listed below.
  - **Graphical Analysis** - displaying the data in a variety of visual formats.
  - **Filtering** - allows you select specific subsets of data to view.
  - **Cross Tabulation** - compare two subgroups of information.
  - **Frequency tables** - show the possible responses, the total number of respondents, and the percentages of respondents who selected each answer.

Note. My office typically summarizes survey results in a report format using frequency and cross tabular tables. See an example of a report by using the web link on page 4 of this document.
How to Determine Survey Sample Size?

Two example sampling method(s) are included below.

**Example 1:**

How big of a sample size do I need?

Using the chart below, select your approximate target population, then choose your margin of error to estimate the number of completed surveys you’ll require.

<table>
<thead>
<tr>
<th>Population</th>
<th>Margin of Error(^a)</th>
<th>Confidence Interval(^b)</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>10%  5%</td>
<td>1%  90%</td>
</tr>
<tr>
<td>100</td>
<td>50   80</td>
<td>99   74</td>
</tr>
<tr>
<td>500</td>
<td>81   218</td>
<td>476  176</td>
</tr>
<tr>
<td>1,000</td>
<td>88   278</td>
<td>906  215</td>
</tr>
<tr>
<td>10,000</td>
<td>96   370</td>
<td>4,900 264</td>
</tr>
<tr>
<td>100,000</td>
<td>96   383</td>
<td>8,763 270</td>
</tr>
<tr>
<td>1,000,000+</td>
<td>97   384</td>
<td>9,513 271</td>
</tr>
</tbody>
</table>

Note. From the web at [http://www.surveymonkey.com/mp/sample-size/](http://www.surveymonkey.com/mp/sample-size/). These are intended as rough guidelines only. Also, for populations of more than 1 million you might want to round up slightly to the nearest hundred.

\(^a\)Margin of Error is a bound that we can confidently place on the difference between an estimate of something and the true value.

\(^b\)Confidence Interval is the likelihood that the sample you picked mattered in the results you got.

**Example 2:**

See the Sample Size Calculator on the Creative Research Systems web at [http://www.surveysystem.com/sscalc.htm](http://www.surveysystem.com/sscalc.htm). You can use it to determine how many people you need to interview for a survey.

**Report Example**


**Qualtrics Knowledge Document and Checklist for Survey Creation**