Survey Development Guidance Checklist

The survey team will embark on **two** types of preparation activities, leading up to the administration of the survey.

Survey instrument development includes preparing and testing the items that will appear on the survey. **Survey administration design** includes determining who will be surveyed and how.

Project Planning
- Clarify purpose.
- Decide how results will be used.
- Establish research questions.
- Create timeline.

Plan Instrument Content
- Outline topics.
- Define constructs.
- Consult literature or experts.

Plan Survey Administration
- Define target population.
- Determine mode: Web, phone or paper.

Search for Items
- Find existing surveys.[1]
- Prioritize tested items.

Prepare Items
- Adapt borrowed items.
- Write new items.

Determine Sample
- Create sampling frame.
- Consider sampling strategies.
- Select sample.

Pretest Survey
- Conduct cognitive interviews.
- Conduct field test.

Prepare to Connect
- Write survey invitation.
- Plan to track nonresponse.
- Prepare follow-up communication.
- Verify contact information.

Revise Draft
- Examine pretest results and revise.
- Prepare final draft.

Administer Survey

Infographic Resources

Reference

Walston, J., Redford, J., & Bhatt, M. P. (2017). *Survey methods in education research: Facilitator's guidebook and workshop resources* (REL 2017). Washington, DC: U.S. Department of Education, Institute of Education Sciences, National Center for Education Evaluation and Regional Assistance, Regional Educational Laboratory Midwest. Retrieved from http://ies.ed.gov/ncee/edlabs

Glossary

Cognitive interview: A one-on-one interview designed to evaluate measurement error in survey questions. Individuals selected to participate in a cognitive interview should be similar to the respondents of interest.

Field test: A small-scale administration of a survey designed to mirror the data collection procedures of the full-scale study. The purpose of a field test is to evaluate administration procedures and survey items to identify potential problems before full-scale data collection. Often used in high-stakes surveys, field testing can lead to revisions that improve the survey with respect to administration procedures, clarity, completeness of data, and accuracy.

Nonresponse bias: Bias in survey findings that occurs if the individuals who did not respond to a survey question are different from individuals who did respond with respect to how they would answer the survey items. For example, if participants are asked to rate their experiences with a program and individuals who liked the program are more likely to respond to the survey, the survey results will contain bias and be misleading.

Pretesting: The process of evaluating whether items are likely to capture the desired information from respondents. Pretesting can occur in one of four primary ways: expert review, cognitive interviews, focus groups, and field testing.

Sample: A subset of the target population from which data will be collected. Several methods can be used to select a sample, including convenience sampling, random sampling, and stratified random sampling.

Sampling frame: A complete list of all eligible members of a target population.

Target population: The group of people or organizations that the survey results will represent and the group of individuals or organizations from which a sample is drawn or a census is conducted.

Endnotes

[1] Surveys used can be either publicly available or copyrighted, but if copyrighted surveys are used, the survey team should ensure that the proper permissions are obtained.