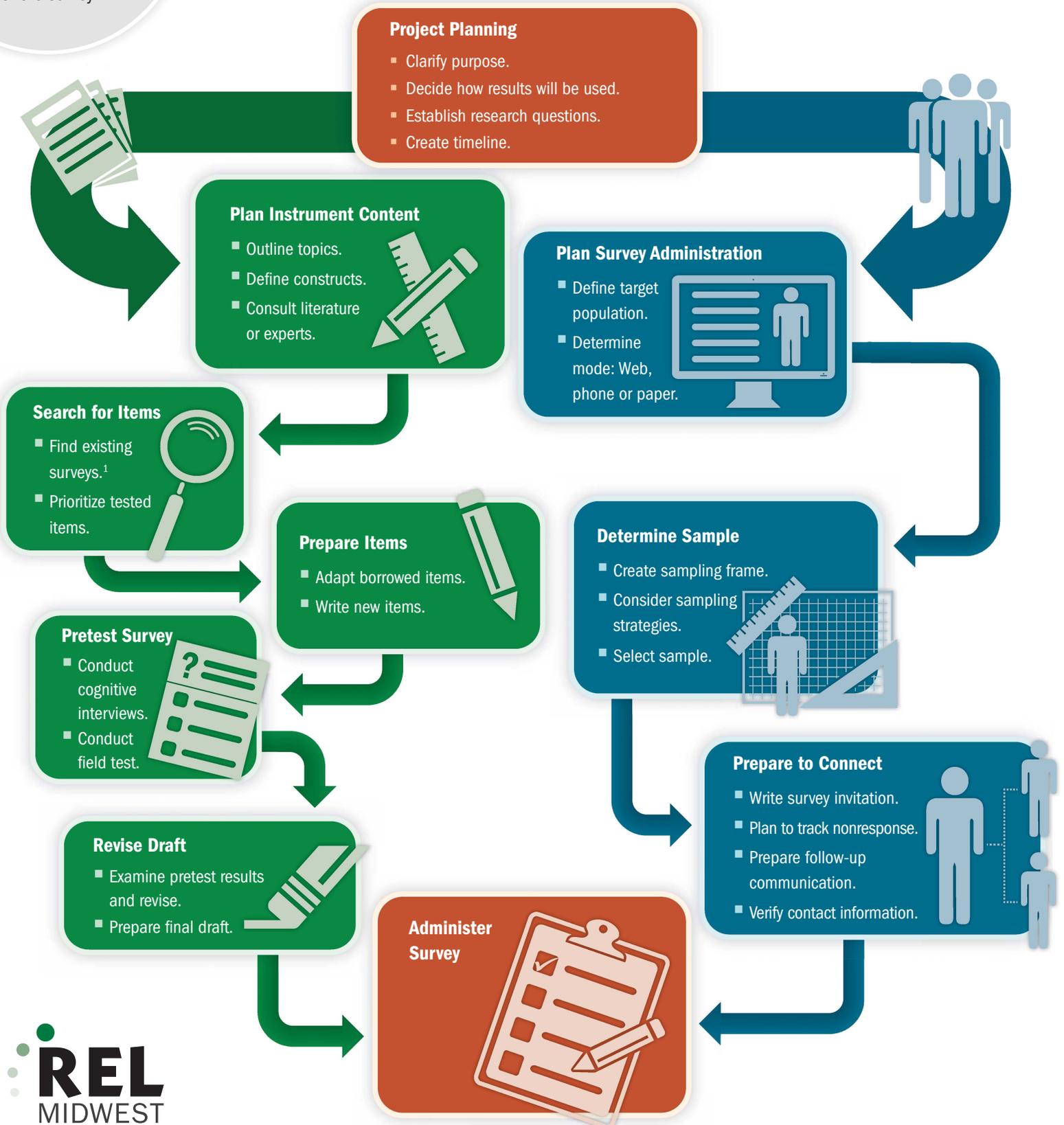# Survey Development Guidance Checklist

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.