



TRANSCRIPT

Creating Effective Surveys: Best Practices in Survey Design

TRAN KEYS

What I cover in the next slide is a short list of general best practices. The first one is always starting with purpose and defining a clear, attainable goal for your survey. I'm going to say a little bit more about this, because it's so important—in the next slide—but for now, let's just remember that the first step is about defining a clear, attainable goal for your survey. We often say, "Don't let your survey get too long." How long is too long? Most of the answers I give here are about, it depends. The idea is, you want to ask questions that make the most sense for you to ask for what you want to get information on.

We say often to keep it brief, to keep it simple, and to keep it specific, asking only the questions that you need to ask, and asking them as clearly and simply as possible. How do you know if it's clear or simple? We're going to focus on that in a little bit, but keep that in mind.

We suggest that you save open-ended and challenging and more personal questions for the end of the survey. We do this because it allows respondents to get comfortable with the survey by asking these simpler, more general questions. That's always a best practice I suggest.

The fifth one: we want to allow respondents to respond, "not applicable," or sometimes it's written as N/A—not applicable—and you want to do this because sometimes the question isn't applicable to the respondent, and so you want to make sure that you're capturing accurate data. If you don't have it, then they might just skip it, then you won't know, when you analyze the data, why they skipped it. So have a "not applicable," because you want to know if it's not applicable to them.

The sixth one is we want to suggest you include a short introduction and a time estimate when you give out your survey. Because before asking respondents to answer questions, you want them to feel comfortable and also to gauge how much time it'll take to take this survey. How do you know? That leads us into number seven, the final general best practice, which is to test or pilot your survey and your survey platform beforehand. And by that I mean, you're developing your survey; ask your coworker to take the survey. Tell them what the purpose is so they know. Like, "I'm giving the survey to teachers. Put on your teacher hat, take the survey, and give me feedback on how the survey reads. Is there anything unclear?" And then for the time estimate I mentioned, if they're taking the survey online, the online platforms automatically record start and end times. They'll give you a calculation. But if you're testing a paper and pencil one, you can still capture this good information. You're piloting it. So have on top they put the start time. After they finish the survey, the last question: the end time—the last spot. Then you can do the calculation and see how long it takes to take the survey. And if you ask 20 folks to pilot your survey, you get an estimate, an average of how long it will take to take the survey. So those are some general best practices.

In the next slide, I mention that I feel that the idea of survey goal is so important. I'm going to say a little bit more about that. In the next slide, you'll see that I give an example of what an unclear, unattainable survey goal would be, and then I provide to you a clear and attainable goal. I have here for an unclear, unattainable goal: "This survey will help us learn about *everything* parents are thinking about their child's math homework assignments." If you can see the slide, you'll see that I highlighted the word "everything." There is no survey that will allow you to capture everything. It's just not possible. It's not realistic. So instead, I rewrote the survey goal. It's a little bit longer, but it explains more. The clear, attainable now survey goal I'm going to give you is: "This survey is designed to understand parents' perceptions about the difficulty, frequency, and variety of their child's math homework last year. Responses will be used to shape the school's guidance to math teachers in the coming year." I hope you see how clear that is in terms of how the first one, about, "You're gonna know everything about what parents think," versus, "We're asking you these questions so that we can plan for the next year." You see? It's a very defined survey goal. It honors your survey respondents, their time, and why you're asking them this information.

I was mentioning that there are two common survey types. We have closed-ended questions, where there are multiple choice or rating scales or checkboxes. Those are really easy for your respondents to answer. If well-written, they provide rich, quantitative data for you to analyze and share out. Our second part of this presentation is about sharing out results. Closed-ended questions are one bucket. The second bucket is open-ended questions—won't be surprising. Open-ended questions ask respondents for feedback in their own words. So, you often see it called free response. This can provide very rich, qualitative data for you to analyze. However, what we will say is that since open-ended questions take much longer to answer and to analyze, we suggest you include fewer of them and also put them at the end of the survey. So, that's just a best practice that we have as well.

This next section, I'm going to talk about what we call "Common problematic questions." I have a list of them. I'm going to zoom through them a little bit faster. These are things that are really important to keep in mind when you're writing survey questions. The first common problematic question that I work with a lot is what's called a "leading question." A leading question is really what it sounds like. It's a question that leads you on to answer a certain way. It's a question that signals, prompts, or encourages a certain answer. I'm going to give you an example of what I would see as a leading question. The example is: "How helpful were your friendly library staff members as you engaged in summer school teaching?" In the previous slide, I'm asking you to take a look at this survey example question, "How helpful were your friendly library staff members as you engaged in summer school teaching?" I mentioned this is a leading question. So, what's the problem with this question and how would you fix it? Type for me in the chat. Wonderful! Folks are already typing in, flagging the word "friendly." That's leading us on, as survey takers, that you want us to say they were friendly. How would you fix this?

What you'll see in the next slide is that the fix is quite easy. It's just making it more neutral, making the wording more neutral. So, instead of what I shared in the previous slide, instead in this slide, I'm going to say, "Rate the helpfulness of library staff members as you engaged in summer school teaching." I'm saying, "rate the helpfulness." I'm taking away the friendly language and then I give them options to answer on a Likert scale.

I'm going to give you another example. Another problematic question, which is what we call a "loaded question." A loaded question is a question that includes an unjustified assumption. It

really forces respondents to agree with the assumption that is in the question. Here's the survey example: "How much do you think test scores will improve because of your school's new reading program?" How much do you think test scores will improve? So, similarly, a question for you in the chat—folks are already putting in—type for me in the chat, what's problematic about this question and how would you fix it? Yes! I see folks are getting it. "Improve." "Improve" is that word that makes it a very loaded question. So, in the next slide, you'll see that the fix I offer is to change out the word "improve." "Improve" suggests there's improvement. Instead, let's say, "How do you expect test scores to *change* because of your school's new reading program?" A lot of times when these types of questions are developed, it's because the program folks want to get information on how their new reading program is going. You want improvement, but really the proper question to ask is about *change*. There's lots of problematic question types.

In the next one we talk about "double-barreled questions." A double-barreled question is a question that asks for an opinion about really two different things, but it allows for only one response. And the survey example here is: "How do you think students' test scores and attendance will change because of the new afterschool program?" How would you fix this? It's asking about two very different things: test scores and attendance. You would hope both of them will be improved, but they're separate. One could improve, and one could not. I love it, people are chatting in, "Ask it as two separate questions." That's exactly it. That's a simple fix. Perfect.

The next one is about—so we talked about double-barreled questions—now, we actually have something called a "double-barreled answer," if you can believe that. And that is an answer option that presents two possibly different opinions as a response to just one question. A double-barreled answer will show you that the question is actually okay; it's very similar to a double-barreled question, but in this case, the problem again is in the answer. The example I will give you—the question is: "What was your personal experience with mathematics in high school?" So, that's the question. And then the answer choices I gave were: "Rate from 1 (did not like or did not succeed) to 5 (passionate about/excelled at)." Here, the question is actually okay: "What was your personal experience with mathematics like?" But it's the answer choices that are not okay. Because you can imagine someone being good at something, succeeding in it, but not really liking it. I think about a friend of mine who is really a whiz at math, but she doesn't really like it. She actually really enjoys cartoons—she likes cartoons, drawing and the creative side. She's really good at it, but she doesn't really like it. So you see how it's different? All right.

Finally, we have something called a "double-negative question." A double-negative question—talking about it makes my mind go crazy, because it's about a question that contains two negative elements that is intended to create a positive element, which really confuses respondents who take the survey. When you hear people speak double negatives—the example I give is: "Is it not uncommon for teachers to coach a sport after school?" Is it not uncommon. That's just too hard for people to process. You're asking for people's time to take this survey. You want to reduce cognitive load as much as possible. You do this by avoiding double-negative questions. So instead of asking, "Is it not uncommon for teachers to coach a sport after school?"—this is the double-negative question—you want to say, "How common is it for teachers to coach a sport after school?" That's the fix. You just take out the double negative.

I'm going to move forward here and talk about Likert scales and rating scales. Yes, you heard me say "lick-ert" scale. You will also hear it referred to as "like-ert" scale. Actually, more

people say “like-ert.” Just a fun fact: when I went to grad school, I had a professor who actually knew Likert back in the 1930s. He was a psychologist who created the Likert scale that we are very familiar with and use, and his name is Likert. So I say “lick-ert” scale. Yes, thank you Dawn, Rensis Likert is his name.

Likert scales or rating scales are close-ended questions and really are great sources of quantitative data. There’s this debate in the survey world of survey design and survey analysis of how many choices is enough? How many options? My answer might not be satisfactory to some of you. I’m going to say it depends. It really does depend. For my work and for most of my purposes, I would say, honestly, 95% of the time, five choices is plenty. It’s enough. You know, “Rate from one to five; choose from five options.” It really depends on, what do you want from it? Do you want very basic, untextured data? If you don’t need a lot of texture—you just want to get a sense from folks, is it positive, negative, or neutral—you just need three options. So it depends on what it is you’re going for. If you need a lot of texture in your responses, I would say five is really good.

We also suggest in your scales that you maintain balance and objectivity. Easier said than done sometimes, which again goes back to one of our best practices: always get someone to review your survey and take it for you. Here I give two examples of answer options. The one down there on the left starts with “Not helpful.” The one on the right starts with “Very unhelpful.” I’m going to ask you to type in the chat, is it the one on the left or the one on the right? Which one has more balance and objectivity to the answer options? Oh my goodness, you guys are so fast! I’m seeing a lot of “right, right, right.” And that is correct, that is right! And the reason for that is, the key indicator for you to see is that there’s this middle, neutral option: “3. Neither helpful nor unhelpful.” So, here it’s balanced because you’re giving two negative opportunities to respond, “Very unhelpful” or “Unhelpful,” you have that neutral, and then you have two positive, “Helpful” and “Very Helpful.” So, it’s a nice balance. I want to make sure you are aware of the different types of questions like that.

Likert scales and rating scales are often really, really wonderful to gauge your respondents’ experience before and after an event. Here, we talk about—you’re doing a workshop. And the example I give here is maybe you have teachers attending a series of workshops to increase their learning about specific strategies for English learners. What a perfect opportunity to embed a question, what we call a pre-survey, so the first time you meet with them, before they even get your workshop learning, ask them this question on a survey: “On a scale of one (least confident) to five (most confident), how confident do you feel in your ability to craft lesson plans with specific strategies for English learners?” So, you ask that question. And like I said, let’s say you have a series of these at the end of the series of sessions; you’re basically asking the same question. The only difference is you say, “After participating in this training...” and then as you can see, the rest of the question remains the same. It’s a great opportunity there for you to do some calculations about change in knowledge, change in experience, feeling, whatever the topic is that you’re covering. I really love the use of Likert scales and rating scales for this.

In the following slide, I give you another example—folks will ask me, “Well, Tran, that’s nice. If you have three or four sessions, you can ask before and after.” In the next slide though, in the example I give you, it’s really the same event. You can still capture this data. It’s really wonderful. This is an example of measuring change and understanding. Let’s say you did a training like this, and you asked this question in the same post-event survey. The answer choices would be something like, “Not at all, a little, a moderate amount, a lot, and a great

deal.” And then you’re able to show your—whatever it is—your boss, your funder, yourself, to see if you made an impact in their learning. You can see how they responded from when they did not—they’re self-assessing how much they knew, to now they’ve taken your three-hour workshop, and now their change in familiarity and comfort, whatever, is now at a different spot. So, it’s a really great way to get data from the same survey, from one event.

I’m going to end here—we’re talking about a really meaty topic that deserves its own time spot. What we are talking about is how to create more inclusive surveys. It’s really important to my organization—to the REL program—that we are putting out surveys that are inclusive of various lived experiences that folks have. So, I’ll give you just four outlines here for how to create more inclusive surveys. The first thing is just being thoughtful about demographic questions. Thankfully, long gone are the days where you take surveys and there’s like 30 demographic questions you’re answering. You’re wondering why, because you’re not really sure why this all applies to what you’re doing. So these days, the idea is just to be really thoughtful about asking them and do you even need to include them? Second point is making survey questions mandatory only if a response is necessary. This is critical in my opinion, because I’ve seen so many surveys now where you see that asterisk where “it’s required.” But really ask yourself, “Is it required?” Because if it’s a question that’s a sensitive question that you’d love to get information on, but it’s not necessary, and there are other parts of the survey you want information on, don’t make it required. Give people the option of skipping. We talk about being mindful of language use in your survey. With that, I will say there are great resources out there, and we link this into our slide deck that you’ll have access to if you need support with that. There’s a lot of really good, free, vetted support for you. And, finally, I do this in my work. I do surveys for a living, but I make sure I consult with resources on inclusivity and bias-free language.

I’m just going to end and say that my final thought is that when we administer better surveys, it leads to more specific and accurate data, which is what we want when we’re collecting data. And better data leads to better evidence for us to make some good decisions, informed decisions. And we do that by following some of these points that I mentioned in all my previous slides, so I won’t go through them again. Everything that I’ve reviewed for you, actually, we recently published late last week an infographic, a reference guide. It’s very short, it’s about eight pages. I highly suggest you get access to that, because it really summarizes the half hour that I just went over. So, I’m really thankful for the opportunity to have the infographic.