

SURVEY CREATION: BRIEF ADVICE AND GUIDANCE

The following list provides general guidance for survey creation. Links are also provided to additional, more in-depth, free resources that can guide the development of surveys.

Include a short survey introduction.

- Before asking respondents to answer questions, welcome them to your survey and indicate a realistic amount of time in which to complete it.
- Provide a deadline for submitting the survey.
- Explain in plain language why the survey is important and how the information will be used to benefit students and the school community.
- Share how findings from previous surveys have led to positive changes or improvements.
- See [template of survey for families](#): PDF pages 9–12 from Data Collection Instrument Drafting (REL Central, 2024).
- See [template for LEA representatives](#): PDF page 25 from Survey Methods for Educators: Selecting Samples and Administering Surveys (REL Northeast & Islands, 2016).

Provide clear instructions.

- State directions clearly for each group of questions. Respondents should not be burdened with following complex directions.
- Indicate when participants can select more than one answer choice.
- Be specific in question wording so there is no ambiguity in what is being asked.



Utilize rich, closed-ended questions whenever possible.

- Use closed-ended questions including multiple-choice, rating-scale (such as rating from 1–5), and checkbox (such as yes/no) questions, if possible. These types of questions provide quantitative data and are often easier for respondents to answer.
- Include an “Other (Please specify) _____” response when the options may not include all possible responses.
- See [this list of Likert type items](#) from Ordered Response Options for Rating Scales (REL Central, 2024).
- See [examples](#): PDF pages 33–42 for illustrative questions for a statewide survey on course offerings (REL Midwest, 2015).

Save open-ended, more challenging, and/or more personal questions for the end.

Allow respondents to get comfortable with the survey by asking easier, more general, and less personal questions upfront.

Test or pilot your survey and survey platform beforehand.

Ask colleagues to test your survey and give you feedback on clarity and ease of responding. This applies to both online and paper-and-pencil surveys.



ADDITIONAL RESOURCES

- [Creating Effective Surveys: Best Practices in Survey Design](#) (REL West/Comprehensive Center West, 2021)
- [Data Collection Instrument Draft](#) (REL Central, 2024)
- [An Educator’s Guide to Questionnaire Development](#) (REL Central, 2016)
- [Practical Strategies to Engage Caregivers in School Climate Surveys](#) (REL Midwest, 2023)
- [Survey Methods for Educators: Selecting Samples and Administering Surveys](#) (REL Northeast & Islands, 2016)

This handout was prepared under Contract ED-IES-22-C-0009 by Regional Educational Laboratory Northwest, administered by WestEd. The content does not necessarily reflect the views or policies of IES or the U.S. Department of Education, nor does mention of trade names, commercial products, or organizations imply endorsement by the U.S. government.