

The University of Scranton

Planning, Assessment & Institutional Research Office

Guidelines for Survey Projects

The University of Scranton Planning, Assessment & Institutional Research Office (P.A.I.R.O) offers consulting services in developing surveys, administering survey, analyzing data, and the interpretation of the results in cooperation with the client/department requesting the services.

These Assessment Guidelines will help you decide which, if any, services might be the most efficient and effective way to get the information that you need for planning or decision-making. This document begins with several questions that you will need to consider before committing your time and resources to a survey project. The second page outlines a sample timeline for a typical survey project. The remainder of the guidelines provide more detailed information about each of the steps in the survey process that will be discussed in the initial planning meeting with P.A.I.R.O staff. A complete survey project from development to reporting results will require approximately four months.

Why Are You Doing a Survey?

People usually conduct a survey in order to gain knowledge or opinions from a target population in order to inform decision making regarding policy, planning, programming, etc. The first step in planning a survey project is to schedule a meeting with P.A.I.R.O in order to determine the needs and expectations of the client. Below are several questions that need to be considered:

- What are the objectives of your survey?
- What are the critical questions to be answered?
- What information do you need to answer the questions?
- Who specifically do you want to survey?
- What have others done on this topic? A review of the relevant literature and published survey instruments could be a considerable time saver.
- Do you really need a survey? Does data already exist that you can use to answer your questions?
- Will you need to get approval from the Institutional Review Board (IRB)?
<http://academic.scranton.edu/department/ors/doyouneedtheirb.htm>
- How the results be used? Is the purpose of your study to describe or explain?
- Will this assist in the completion/progress of your department assessment plan?


(Suskie, 1996)

Time line for Survey Project

The time line for the project is very important and needs to be strictly followed for completion by the targeted project deadline. Below is an example of a typical time line for a survey project. The time line contains the activities, time in work weeks or days, name of the person responsible for completion of the activity and the deadline for that activity. The completion of the project is contingent on the cooperation of the client requesting the survey with the P.A.I.R.O staff on all assigned deadlines.

(Suskie, 1996)

Example Time Line for Fall Survey Research Project

Complete? 	Task	Responsible person	Start date	Time needed (in work weeks)	Deadline
Developing Survey					
	Initial meeting	Client/P.A.I.R.O	June 15	1 hour	June 15
Run concurrent	Plan survey project	Client/P.A.I.R.O	June 15	2 weeks	June 29
Run concurrent	Review what others have done	Client/P.A.I.R.O	June 15	2 weeks	June 29
	Develop questions	P.A.I.R.O	June 30	1 week	July 7
	Optional Meeting	Client/P.A.I.R.O	July 8	1 hour	July 8
Administering Survey					
Run concurrent	Write cover letter/email memo	Client	July 8	1 week	July 15
Run concurrent	Publish to server	Webmaster	July 8	1 week	July 15
	Pilot-test survey	Client/P.A.I.R.O	July 18	1 week	July 25
	Design data methodology	P.A.I.R.O	July 25	2-3 days	July 27
	Select and pull sample	P.A.I.R.O	July 27	1 week	August 3
	Collect additional data as needed	Client/P.A.I.R.O	August 3	2 weeks	August 17
	2nd meeting	Client/P.A.I.R.O	August 17	1 hour	August 17
	Written client approval to administer the survey	Client	August 18	1 day	August 18
	Launch survey	P.A.I.R.O	August 19	1 day	August 19
Run concurrent	Wait for returns and import data	P.A.I.R.O	August 19	2 weeks	September 2
Run concurrent	Prepare follow-up email, if necessary	Client	August 19	2-3 days	August 23
Analyzing Survey Data					
	Check Data	P.A.I.R.O	September 6	2-3 days	September 8
	Analyze data	P.A.I.R.O	September 8	1 week	September 15
Interpreting Results					
	3rd meeting	Client/P.A.I.R.O	September 16	1 hour	September 16
	Write Report	Client/P.A.I.R.O	September 19	2 weeks	October 3
	Have Report Typed and distributed	Client/P.A.I.R.O	October 3	2 weeks	October 17

Should You Use a Published Questionnaire or Design Your Own?

If you have answered all of the above questions and have decided that you do need to administer a survey, what type of survey would best serve your needs? Please consider the following options.

Published Advantages

- * Available reliability and validity
- * Comparative Data (ex. National norms)
- * Vendors can administer the survey and correspondence.

Published Disadvantages

- * Higher Cost
- * May contain irrelevant information not needed
- * May take months to receive survey results

“Home-Grown” Advantages

- * Contains focus questions that are related to your questions
 - * Lower budgetary cost
 - * Does not have a participation deadline
 - * Survey results available sooner
- (Suskie, 1996)

“Home-Grown” Disadvantages

- * No available reliability and validity
- * No comparative data (ex. national norms)
- * Survey has to be developed, formatted, and administered by campus employees

Step 1: Developing a Survey

The development of a survey is the most crucial part of the process. This is the time when the client and the P.A.I.R.O analyst discuss:

- Purpose of the survey
- The questions to be answered
- The format of the survey questions
- What is the minimal amount of questions that need to be included in the survey in order collect the necessary information?
- Who will be surveyed?
- When will the survey be administered?
- How the survey be administered?

The client should be aware that P.A.I.R.O uses a sample rather than the whole target population. Sampling avoids over sampling specific populations. P.A.I.R.O also prefers to use a web based survey product to eliminate the need to hand enter data. *

A time line will be developed in order to keep the project on track and allow the project to be completed by the agreed upon date. It is expected that the client will designate a person in their area who will complete the necessary tasks in the time line. The success of the project will be dependent upon the client managing the project and assuming responsibility for all timeline activities assigned to them.

The survey development will begin with a one-hour meeting between the analyst and the client to discuss the specifics of the project. The analyst will send a meeting agenda to the client prior to the meeting. During the meeting the analyst will interview the client to clearly identify the needs of the project and to develop an outline of potential questions. The client and analyst will then have two weeks to perform a literature review and develop a final set of questions. At this juncture the client can schedule another meeting with the analyst or communicate via email to approve the final set of questions. The development of the final questions will require one workweek.

*If the client does not want to administer the survey via the web, the project will require an additional month in the time line in order to print surveys, obtain names and addresses for mailing survey memos, mail memos, wait for responses, and enter the data.

Step 2: Administering the Survey

Now that the survey is developed, it is necessary to develop a communication plan for administering the survey. The client will be responsible for developing a written purpose for the survey and all of the communications that will accompany the survey. P.A.I.R.O will provide templates for these communications.

Communication Plan for Web Surveys

The client will develop an email memo that includes (examples available from P.A.I.R.O):

- ✓ The purpose of the survey
- ✓ How the sample was chosen (random, targeted, etc.)
- ✓ Incentive, if applicable
- ✓ The survey is either anonymous, confidential, or both
- ✓ Approximate amount of time to complete the survey
- ✓ How the results will be used (planning, decision-making, etc.)
- ✓ How the results will be reported
- ✓ Deadline for survey submission
- ✓ Closing

Any follow up emails will also be developed by the client and will include:

- Brief restatement of the purpose
- Indicate that this is a second request for participation
- Restate incentives, if applicable
- Deadline for submission
- Closing

The client may also want to promote the survey administration on campus in order to increase potential response rates. The form and method of promotion would be the responsibility of the client. The client is responsible for incentives if they choose to use them.

Communication Plan for Paper Surveys

A paper survey will also include the same information as in the above email memos, if applicable. In addition, the client will be responsible for printing the memos, addressing the envelopes, and paying for postage. P.A.I.R.O will provide copies of the survey instrument to the client.

Survey Administration

The following tasks have to be completed in order to successfully administer a survey:

- ✓ Publish the survey to the web
- ✓ Pilot test the survey to make sure it is functional and the data can be retrieved
- ✓ Obtain the population to be sampled
- ✓ Select sample
- ✓ Meet with P.A.I.R.O analyst to finalize survey questions
- ✓ Receive written approval of survey instrument from the client to proceed with survey administration
- ✓ Launch emails with survey link embedded

Step 3: Analyzing Survey Data

The time needed for data retrieval from a web survey is minimal. The analyst will perform a series of checks on the data to assure the data quality. After the data is retrieved and checked, the analyst will provide the client with an electronic copy of the survey with the results in the questions areas. The results can be presented as percents or absolute counts, depending on how the client wants to present the results. The analyst will also analyze the data for patterns and themes.

Step 4: Interpreting Results

Once the data has been checked and analyzed, the analyst will meet with the client to discuss the findings. The client will be responsible for reviewing the data prior to the meeting. This meeting is very important. Only the client can put the results into context. The analyst can hypothesize about the results, but the client will be the person using the results. During this meeting, an action plan will be developed including to whom the results will be communicated.

The analyst, if requested, will formulate a brief report (3-5 pages) of the data highlights. The analyst will forward a draft of the report to the client to review for accuracy and typographical errors. Upon approval, the analyst will finalize the report, send an electronic copy back to the client, and prepare the report for distribution.

References

Suskie, L.A. (1995). *Questionnaire Survey Research: What Works* (2nd ed.). Tallahassee:

Association of Institutional Research.