

Are you Considering a Survey?

Surveys allow for the systematic collection of data. They provide an unbiased snapshot of the population of interest at a specific point in time (cross-sectional) or at different points over a period of time (longitudinal). The steps for planning a survey include deciding on the goal of the survey, identifying the target population, how the data will be collected, analyzed, reported and used, and other considerations.

BEFORE BEGINNING

Ask Yourself:

- What are you trying find out?
- Is this information available elsewhere?
- Is a survey the most appropriate way of collecting this information (e.g., consider interviews, focus groups, etc.)?
- How and by whom will this information be used?
- Do validated survey instruments already exist that ask the questions you need to ask?

Before Developing A Survey Make Sure That You Have:

- The resources required to undertake a survey (refer to Resource Considerations).
- A clear plan that includes the identification of roles and responsibilities for each of the activities required to undertake a survey and report and use findings.

RESOURCE CONSIDERATIONS

Resources are required to plan and administer a survey as well as to analyze and report on the survey findings. The following list provides a general overview of the activities required to undertake a successful survey:

- Research question development and confirmation of a survey as the appropriate method.
- Development of a survey plan that includes a:
 - Communication plan.
 - Survey cover letter.
 - Survey promotion/distribution.
 - Communication of findings.
 - Sampling plan.
 - Survey instrument/questionnaire.
 - Hardcopy (paper).
 - Programming (online).
 - Field testing.
 - Plan for data entry (if required).
 - Plan for data extraction & cleaning.
 - Plan for analysis & reporting.

PLANNING FOR DATA COLLECTION

- Who will be asked to participate in the survey and how will they be identified?
- What is the most appropriate way to survey your target population (hard copy, online, mix)?
- How will respondents be made aware of the survey/ invited to participate?
- Will respondents need support to complete the survey?
- When and for how long will the survey be available?
 - What other surveys or consultation are occurring during this time that might impact responses?
 - Is this a time when many staff are likely to be on holiday?

Considerations for Online Surveys:

- Collecting data with an electronic form minimizes the need for data entry at a later time and reduces the possibility of errors that might occur in the process.
- Option of generating unique web links for respondents or providing a generic web link to all potential respondents.

Considerations for Paper-Based Surveys:

- Requires resources for printing and data entry.
- Requires postage or drop box.
- Limits capacity for skip patterns and may limit opportunity for open-ended responses.
- Respondents may not fill out as instructed.

For online surveys **Do Not** use SurveyMonkey. Island Health has an account with FluidSurveys (contact karen.clifford@viha.ca) and uses REDCap (available for a fee through Research & Capacity Building).

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ETHICAL CONSIDERATIONS

Depending on the purpose of your survey and what data is being collected you may be required to submit a an application to the Health Research Ethics Board (HREB) or Clinical Research Ethics Board (CREB). For more information contact the Research Ethics in the Department of Research & Capacity Building.

Regardless of whether or not an HREB or CREB application is required, all surveys should be conducted in an ethical manner and one that accords with best research practice.

Two important ethical issues to adhere to when conducting a survey are confidentiality and informed consent. Refer to the Information Letter description on page 3.

DESIGNING A SURVEY INSTRUMENT

Creating a Good Survey Questionnaire

The design, wording, form and order of questions can affect the type of responses obtained, and careful design is needed to minimize bias in results.

- Consider what demographic questions will need to be collected for you to analyze and present your data (e.g., by age, gender, services received, etc.)?
- To minimize data collection errors, wherever possible limit manual entry of numbers or text.
- Don't ask for personal information (e.g., age, position, etc.) unless you need it.
- Use plain language.
- Keep questions short and concise.
- Any question that is not providing necessary information should be removed.
- Ask questions in a neutral way (do not lead responses).
- Provide instructions on how to complete survey (e.g., select all that apply, select only one response).
- Consider response options/scales.
- Ask only one question at a time (do not ask double or triple barreled questions).
- Organize questions (group together by subject).
- Present questions in a clean and organized layout.
- Test survey questions.

A survey should be tested with a sample of the target population. This will help:

- Identify whether respondents understand the questions and instructions;
- Whether the meaning of questions is the same for all respondents;
- Identify whether sufficient response categories/options are available.

The method of data analysis will depend on the design of the survey and should be carefully considered in the planning stages of the survey.

Additional Considerations

- **Survey Length:** The amount of time it will take to complete the survey may impact whether or not individuals choose to participate.
- **Open-Ended Questions:** Although these types of questions are exploratory and allow respondent to provide any answer they choose without forcing them to select concrete options, it is important to remember that additional resources will be required to clean, code and analyze open-ended responses.
- **Validity:** The way a question is worded can effect the accuracy of measurement. It is important to ensure that the questions are worded in a way that measures what it is supposed to be measured.
- **Survey the Entire Target Population or a Sample:** Depending on the purpose of the survey, the size of the target population, and the resources available, a sample (subset of target population) may be surveyed instead of the entire target population.
- **Response Rate:** Response rates are important if you want to have confidence that your survey results are representative of the target population. They are calculated by the number of people whom answered the survey divided by the number of people invited to participate in the survey.
- **Anonymity:** Anonymous surveys do not collect and are not linked to any personally identifiable information related to the respondent.
- **Incentives:** Some surveys offer incentives to participate. Who will pay for these incentives? If required, how will contact information be collected?

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If personal and identifying information is collected in the survey it is important to ensure your survey meets any and all privacy requirements.

INFORMATION LETTER

All participants should be provided with information such as:

- Who is conducting the study.
- The purpose/aims of the study.
- Who to contact if they have any questions.
- What will happen with the information provided.

Cover letters should both encourage the respondent to participate in the study and also meet the requirements of informed consent.

REPORTING CONSIDERATIONS

- Who is the audience?
- What is the purpose of reporting to the audience(s) identified?
 - How will the findings be used?
 - What level of analysis will be required to meet these needs?
- How frequently will reporting be required?
- In what format should reporting be provided?
- If the survey respondents are not the primary audience—how will survey findings be shared with the respondent?

Sharing a summary of findings with survey participants is a key step to supporting future survey participation.



ADDITIONAL RESOURCES

- **Statistics Canada, Questionnaire Design** <http://www.statcan.gc.ca/edu/power-pouvoir/ch2/questionnaires/5214775-eng.htm>
- **University of Wisconsin-Madison, Survey Fundamentals, A Guide to Designing and Implementing Surveys** http://oqi.wisc.edu/resourcelibrary/uploads/resources/Survey_Guide.pdf
- **Research Methods Knowledge Base, Survey Research** <http://www.socialresearchmethods.net/kb/survey.php>

