Best Practices in Survey Instrument Design

A Checklist

Surveys are a powerful tool for collecting data, communicating values, and engaging stakeholders. This checklist was developed to provide support in creating meaningful, accurate, and user-friendly surveys that influence next-steps and improve service delivery.

Getting Started

☐ Determine if the data you need already exists.

☐ Discuss whether or not a survey is the best way to collect the desired information. Remember that a survey is only one way to collect data.

☐ State a clear purpose for your survey that includes an explanation of why the data is necessary and how it will be used to make decisions.

Building and Protecting Rapport

☐ Begin all surveys with a friendly introduction that includes:

1. Your clearly stated purpose.
2. Definitions of essential terms.
3. The expected time commitment for completing the survey.
4. Contact information for questions.
5. A description of how the data will be used and, if appropriate, shared with participants.
6. A due date.

☐ Ensure every item on your survey applies to every respondent. If some items do not apply, reconsider your audience or use the branching/automatic skip feature within the instrument.

☐ Plan to thoughtfully and regularly reach out to non-respondents to encourage participation while the survey window is open.

☐ Ask only essential questions that clearly align with the survey’s purpose.

☐ Place sensitive, demographic questions at the very end of the survey.
Improving Reliability and Validity

- **Offer an appropriate number of response options, and visually balance the midpoint.** It is considered best practice to offer five options when using a Likert scale.

- **Avoid agree/disagree response choices and, instead, use context-specific options.**
  
  Original Question: I feel comfortable asking my supervisor for support.

<table>
<thead>
<tr>
<th>strongly disagree</th>
<th>disagree</th>
<th>neutral</th>
<th>agree</th>
<th>strongly agree</th>
</tr>
</thead>
</table>

**Improved Question:** How comfortable do you feel asking your supervisor for support?

<table>
<thead>
<tr>
<th>not comfortable at all</th>
<th>slightly comfortable</th>
<th>moderately comfortable</th>
<th>quite comfortable</th>
<th>extremely comfortable</th>
</tr>
</thead>
</table>

- **Avoid double-barreled questions.** For example: “Do you have the time and resources necessary to do your job well?” can put participants on a tricky situation because “time” and “resources” are two separate things. Instead, separate items and ask about them one at a time.

- **Choose a response format that accurately answers your question and is mindful of the end-user experience.** For example, asking people to “check all that apply” often results in people picking items towards the top of the list and skipping the items further down.

- **Offset “N/A” or “Unsure” responses choices and use only when necessary.** Formatting questions in this way keeps the midpoint centered.

  So, for example, instead of this:

  ![Original Format](image)

  It could look like this:

  ![Improved Format](image)

- **Label all response options with verbal labels.** Research has shown that verbal labels hold a more consistent meaning for participants than numbers.

- **Ask the most important questions at the beginning of the survey.** By asking the most important questions at the beginning, you increase the likelihood those questions will get answered.

- **Confirm response options are exhaustive and mutually exclusive.**

- **Ask questions using specific and concrete language.** For example, rather than asking, “Are you confident in your ability to communicate effectively?” ask, “How confident are you in your ability to share student progress at parent-teacher conferences?” Not confident at all —- Very confident...
Resources
