Survey Checklist
University Assessment Services, Illinois State University

Introduction
Evaluation checklists ensure quality research projects by creating a framework for project completion and ensuring essential tasks are addressed. This checklist addresses survey administration and use.

For more information about evaluation checklists, see the Western Michigan University Evaluation Center’s Evaluation Checklist Project.¹

Purpose
- Identify survey purpose.²
- Write research questions.
- Identify survey variables.³
- Clarify if a survey is the best method for answering the research questions.⁴

Logistics
- Identify project lead and research team.
- Select survey administration method (online, paper, telephone, etc.).
- Inform all units or individuals impacted by the survey.
- Establish timeline, including survey administration window.
- Obtain leadership endorsement of survey project.
- Publish survey in Qualtrics. Keep the survey in Preview mode until the survey is ready.

Capacity
- Clarify research team qualifications and skills necessary to administer the survey.
- Clarify research team qualifications and skills necessary to analyze and use results.
- Ensure willingness to use results.

Costs
- Identify direct and indirect costs.⁵
- If working with a vendor or purchasing a survey, contact the ISU Purchasing Office before signing a purchase agreement.⁶

¹ Western Michigan University Evaluation Center
² Examples: See what students are learning, program or curriculum improvement, improving a process, identifying student needs, clarifying the impact of a program, seeing if a program was implemented effectively, and formative evaluation. For more information, see Centers for Disease Control.
³ Examples: how students spend their time, engagement with faculty, or sense of belonging.
⁴ Other data sources include ISU data sources or interviews / focus groups.
⁵ Direct costs include instrument costs, fees, paid labor, software, supplies, etc. Indirect costs include staff time for survey administration, analysis and reporting.
⁶ ISU Purchasing Office, About.
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Population and Sampling
☐ Ensure the survey population has the ability and subject-knowledge to answer the questions.
☐ Define population (first-year students, tenure-track faculty, civil service staff, etc.).
☐ Decide whether to survey entire population or sample.
☐ Determine appropriate or acceptable response rate.
☐ Determine if survey will be identifiable, anonymous or confidential.\(^7\)
☐ Determine how non-responses will be addressed.
☐ Request survey population / sample list.\(^8\)
☐ Determine how list of names will be gathered, if applicable.\(^9\)

Messaging
☐ Write recruitment invitation letter, e-mail, or script. Include the following information:
  ☐ Who is administering the survey.
  ☐ Why the survey is being administered.
  ☐ How the results will be used.
  ☐ Statement of confidentiality or anonymity.\(^10\)
☐ Determine recruitment message or e-mail signatory.
☐ Determine number of reminders (if applicable).
☐ Write E-mail subject line.
☐ Determine if respondents will be e-mailed from Qualtrics, your own e-mail, or through ISU administrative technologies.\(^11\)
☐ Contact options in Qualtrics:
  ☐ Anonymous link. All respondents receive the same link and are not identified (unless they voluntarily self-identify).
  ☐ Traceable link. Each respondent receives an individualized link. Respondents must be informed of this.

Recruitment & Promotions
☐ Create marketing and promotions plan.\(^12\)
☐ If the population is large numbers of ISU faculty, staff, or students, complete mass e-mail request through Administrative Technologies.\(^13\)

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\(^7\) Difference between confidentiality and anonymity; [Qualtrics, Anonymous vs Confidential Surveys](#) and [Evergreen State University](#).

\(^8\) ISU Planning, Research, & Policy Analysis (PRPA), [Data Requests](#).

\(^9\) Generally, preferred or legal name.

\(^10\) Difference between confidentiality and anonymity; Qualtrics, Anonymous vs Confidential Surveys and Evergreen State University.

\(^11\) ISU Administrative Technologies, [AT Help](#).

\(^12\) Indiana University Center for Postsecondary Research, [Encouraging Student Participation](#).

\(^13\) ISU Administrative Technologies, [AT Help](#).
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Compensation and Incentives

☐ Determine if survey respondents will be compensated (gift cards, merchandise, cash, etc.)
  ☐ If yes, ensure compensation meets ethics guidelines and tax regulations. 14
  ☐ Track individuals who received compensation.

Survey Question Guidelines & Flow

☐ Ensure responses are coded.
☐ Determine if demographic questions are necessary 15 or if demographic information can be matched from other sources.
☐ Ensure demographic questions are current with evolving terminology. 16
☐ Do not ask respondents for information they don’t have. 17
☐ Do not place too much burden on respondent memory. 18
☐ Avoid leading questions. 19
☐ Avoid double-barreled questions. 20
☐ Avoid acronyms. 21
☐ Avoid negatives in questions. 22
☐ Ensure survey questions are exhaustive. 23
☐ Use “don’t know,” “no opinion,” or “neutral” options, if appropriate. 24
☐ Ensure survey questions avoid bias. 25
☐ Reconsider using agree / disagree questions. 26
☐ Include a progress bar or percent completion status.
☐ Include back and front buttons.
☐ Consider an open-ended comment box at the end to capture respondent information not addressed in the survey.

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14 ISU Research Ethics & Compliance, Human Subjects Payments.
15 J. Frederick, Jan. 2021, Ithaka-SR, When to Ask or Not Ask Demographic Questions.
17 Example: “How effective is the online XYZ application in helping you plan your schedule?” Solution 1: [Pre-question]: “Are you aware of the XYZ scheduling application?” Solution 2 [response options]: “Very effective, not effective, no opinion, unaware of XYZ scheduling application.”
18 Example: “How many times did you meet with your advisor last year?” Solution: “About how many times did you meet with your advisor last year?”
19 Example: “Experts believe studying five hours a day is extremely important. Do you study five hours a day?”
20 Example: “I feel welcomed by faculty, staff, and other students.” Example 2: “Rate the presentation on clarity, style, and use of graphics.” Solutions: Create three questions for each example.
21 Example: “How often have used services provided by SHS?” Solution: “How often have you used Student Health Services?”
22 Example: “Agree or disagree: There are not many fun things to do on campus that do not involve alcohol.” Solution: “There are lots of fun non-alcoholic events on campus.”
23 Example: “What type of family did you grow up in?: One father and one mother; one mother; one father.” Solution: “Grandparents, foster family, two parents (father and mother), two mothers, two fathers, other.”
24 Example: “Graduate assistants receive more training than in the past: yes or no.” Solution: “yes, no, not sure.” See also: footnote 17.
25 Biased survey questions are: 1) offensive to certain groups and 2) unfairly penalize individuals based on their representation. Examples: Depictions of people in stereotypical manners, assuming individuals represent or speak for a group, or language that can be interpreted in an offensive or emotionally charged manner.
26 Example: “My instructor provides clear instruction: agree or disagree.” Solution: “How clear is your teacher with instruction: Extremely clear, not clear at all.”
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Piloting & Testing
- Pilot survey with a similar population (first-year students, civil service staff, etc.).
- Consider a panel or informal group of experts or colleagues to review the survey.
- Things to look for in a pilot:
  - Appropriate survey length and completion time.\(^{27}\)
  - Biased or inappropriate questions.
  - Style and grammar.
  - Logic skip patterns and display logic.
  - Unnecessary / unactionable questions.
- Pilot on multiple devices, including desktop and laptop computers, tablets, and phones.
- Add research team to survey distribution list for testing.

Research Ethics & IRB
- Verify if project requires an IRB.
  - Contact UAS to see if your assessment or evaluation project warrants an IRB.\(^{28}\)
- Read instructions on submitting an IRB protocol at ISU.\(^{29}\)
- If a collaborative study with another institution, check with Research & Ethics Compliance.\(^{30}\)
- Write informed consent statement.\(^{31}\)
- Check survey compliance with accessibility standards.\(^{32}\)
- If the research takes place outside the United States, ensure data collection and use is compliant with international standards.\(^{33}\)
- Verify if minors are or could be included in your study.\(^{34}\)

Data Security
- Identify where data will be stored.
- Identify how data will be protected.
- Identify who will have access to the raw data files.
- Clarify how data will be presented and displayed. Set a minimum ‘n’ to protect respondent information.

\(^{27}\) Qualtrics provides an estimated response time. UAS has found the time to be a reliable estimate.
\(^{28}\) ISU Research Ethics & Compliance, Research Requiring IRB Review.
\(^{29}\) ISU Research Ethics & Compliance, Submitting a Protocol.
\(^{30}\) ISU Research Ethics & Compliance, Collaborative Research.
\(^{31}\) ISU Research Ethics & Compliance, Tips on Informed Consent.
\(^{32}\) ISU Technology Solutions, Website and Digital Accessibility and Qualtrics, Survey Accessibility.
\(^{33}\) ISU Research Ethics & Compliance, IRB International Research Requirements.
\(^{34}\) ISU Environmental Health & Safety, Minors Activity Compliance Committee (MACC).
Use of Results and Analysis

☐ Clarify who is responsible for using results.
☐ Identify audiences (leaders, committees, etc.).
☐ Determine analytic method.
☐ Determine analysis tool (Excel, SPSS, Power BI, qualitative software, etc.)
☐ Choose data presentation methods (online analytics, written reports, etc.).

Resources

☐ ISU Research & Ethics Compliance.
☐ ISU University Assessment Services.
☐ Qualtrics, Survey Basics Overview.
☐ Qualtrics, How to Increase Response Rates.