**ESS Assessment – *Survey Planning Checklist***

The purpose of this checklist is to help those who are planning a survey project to account for all necessary details to support successful administration of their project. Contact [matt.bryant@wwu.edu](mailto:matt.bryant@wwu.edu) with any questions or for further assistance.

* **Identify your research question(s) and population**
  + *What do you want to know, and about/from whom*?
    - “The idea is to come up with a specific, measurable, and relevant goal for your survey. This way you ensure that your questions are tailored to what you want to achieve and that the data captured can be compared against your goal.” ([Qualtrics survey guidance](https://www.qualtrics.com/blog/10-tips-for-building-effective-surveys/))
  + *Do we already have data to answer your question(s)*?
    - Review the [WELS](https://oie.wwu.edu/wels/) and [FactBook](https://oie.wwu.edu/factbook/) maintained by the Office of Institutional Effectiveness (OIE) to see if suitable (or related) data is already available
* **Determine your assessment method(s)**
  + *Is a survey the right option*?
    - Depending on your research question(s), other assessments such as focus groups, interviews, rubrics, etc. may be more appropriate
    - For more information about alternative assessment methods, see [Outcomes Assessment Methods](https://vpess.wwu.edu/files/2020-07/ESS%20Assessment%20-%20Outcomes%20Assessment%20Methods.docx) guidance
* **Define your timeline** 
  + *When do you need to know, and how long will it take to find out?*
    - Depending on the instrument, survey design and testing can take 1-2 weeks (or longer), and it is recommended for surveys to remain open for 2-4 weeks to maximize responses
    - If you need to answer your research questions sooner than 4-6 weeks out (or longer), consider an alternative assessment method
  + *Does your timeline conflict with other surveys?*
    - For surveys sent to more than 100 students, refer to the [OIE Survey Calendar](http://outlook.office365.com/owa/calendar/037bf175ffa34dcbaa7cb73317eb0b04@wwu.edu/bc8a87eb002c446ca249920aab24a50c16261461615059558989/calendar.html) to avoid scheduling conflicts (and minimize survey fatigue)
* **Select your platform**
  + *Will you use Forms, Qualtrics, or another platform?*
    - Forms: more user-friendly, better for smaller/internal projects, can potentially be used to automate approvals/notifications
    - Qualtrics: more advanced features, better for larger/external projects, more distribution options (automated email reminders)
    - Other: some departments use other communications platforms which may be more appropriate for surveying specific populations (e.g. Handshake)
* **Design your instrument**
  + *What do you need to know about your respondents?*
    - It is recommended to avoid including demographic questions (ethnicity, gender, etc.) in your instrument, as these data are considered sensitive and are already available through student records and can easily be matched with survey responses using Qualtrics (pull data using Banner and/or request from OIE)
  + *How will you structure your instrument?*
    - Some basic instrument design recommendations include:
      * Keep it short and simple
      * Make every question count
      * Ask one question at a time
      * Speak your respondent’s language
      * Start with the straightforward stuff
    - See [Qualtrics survey guidance](https://www.qualtrics.com/blog/10-tips-for-building-effective-surveys/) for more tips
  + *How will you design your items?*
    - Some basic item design recommendations include:
      * Avoid leading language
      * Give mutually exclusive choices
      * Ask direct questions
      * Include “prefer not to answer” option
      * Include all possible answer choices
      * Be mindful of using scales
    - See [Qualtrics questions guidance](https://www.qualtrics.com/blog/writing-survey-questions/) for more tips
    - For more detailed guidance, see the [Qualtrics Handbook of Question Design](https://vpess.wwu.edu/files/2020-07/ESS%20Assessment%20-%20Survey%20Item%20Guidance.pdf)
  + *How long will you make your survey*?
    - It is recommended to limit your instrument to 20 or less items (if possible) which take 15 minutes or less to complete, in order to maximize your response rate
* **Plan your distribution method**
  + Forms: Forms provides the option to distribute your survey using a link or QR image (see [Share a Form](https://support.microsoft.com/en-us/office/share-a-form-384371be-f1e7-4628-bcba-abd3d6123917) support page for more details)
  + Qualtrics: Qualtrics provides the option to distribute your survey using a link or through the built-in mailer functionally (see [Distributions Overview](•%09https:/www.qualtrics.com/support/survey-platform/distributions-module/distributions-overview/) for more details)
    - The Qualtrics mailer allows for scheduling reminder messages, and at least one reminder is recommended to maximize your response rate
  + *Sampling:*Please note that for many projects it is unnecessary to survey the entire population (especially large populations), and surveying a sample of the population may be a more appropriate approach – [contact OIE](mailto:oie@wwu.edu?subject=Requesting%20Sampling%20Assistance) for assistance in creating a sample
* **Identify your sender and craft your message**
  + Regardless of your distribution method, you will need a point-of-contact for sending out your survey and responding to any questions
  + You will also need to include a message with your survey distribution to identify your department, explain the purpose of the survey, encourage participation, ensure confidentiality (as appropriate), and provide the opportunity to ask questions
* **Test your instrument**
  + It is highly recommended that you test both your distribution method and survey instrument prior to administering the project
    - Test all item responses and display/skip logic
    - See [Qualtrics: About Testing](https://www.qualtrics.com/support/employee-experience/getting-started-employee-experience/360-onboarding/next-steps/) for more details
* **Launch your survey!**