# databoom

# Survey Planning Process

## Survey Planning

**Identify the purpose of the survey**

**Identify how results will be used**

**Establish research question(s)**

**Identify scope of survey**
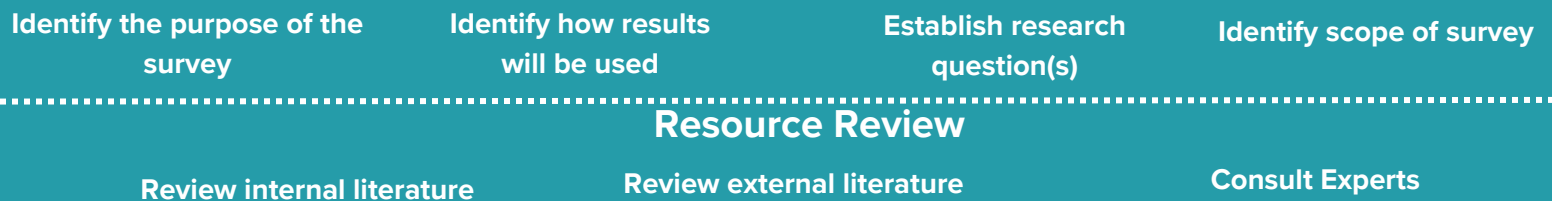
## Resource Review

**Review internal literature**

**Review external literature**

**Consult Experts**

## Workstreams

### Questionnaire Design

**Use literature review to plan questionnaire content**
- Start with concepts, not questions

**Search for questionnaire items**
- Look for existing surveys
- Prioritize tested/ validated items

**Prepare questionnaire items**
- Adapt borrowed items
- Create new items where necessary
- Translate questionnaire into multiple languages (if needed)

**Pretest questionnaire**
- Test for understandability, usability, flow, and time needed to complete questionnaire
- Debrief with pre-testers to garner feedback

**Revise questionnaire and prepare final draft**
- Allow sufficient time for meaningful revisions
- Include multiple stakeholders
- Ensure that revisions are consistent across multiple languages (if needed)

### Survey Administration

**Plan survey administration**
- Who, what, where, when, how many

**Determine sample**
- Create sampling frame
- Consider sampling strategies
- Select sample
- Confirm sample with client

**Prepare to connect with respondents**
- Write survey invitation
- Develop a strategy for tracking and managing non-responses
- Prepare follow-up communication
- Verify contact information
- Test communication

### Data Analysis & Use Plan

**Identify decision-makers who will use results**

**Identify decision-makers' preferences for data display**

**Design dummy tables or wireframes for communicating results**
- Display the most important results on a landing page
- Identify appropriate views and filters
- Ensure the appropriate flow of results

## Administer Survey

# HELPFUL TIPS

## SURVEY PLANNING

- Start at the end - what do decision-makers need to do with results?
- What information do they need to inform decisions?
- Keep research questions simple and focused
- Use what's available; adapt or create what you need

## QUESTIONNAIRE DESIGN

- Organize concepts in a whiteboard so you can easily refine them and arrange them in a logical sequence
- Survey platforms can be tricky, allow sufficient time to understand and adjust the structure of the questionnaire
- Provide a variety of question/ response types to alleviate monotony (e.g., lists, binary options, scaled items); limit open-ended questions
- Pretest in the survey platform that will be used for data collection
- Clearly establish how many rounds of revision will be permitted

## SURVEY ADMINISTRATION DESIGN

- Define survey population ; identify whether a generalizable sample is needed
- Identify how you'll administer the survey and the resources needed to suppport the platform - e.g., Kobo Toolbox, QuestionPro

## Data Analysis & Use Plan

- Ask about potential pain points - where do decision-makers feel overwhelmed by data?
- Ensure that data populates properly on the backend of the platform to complete tables/ dashboards

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