

Survey Planning Tool

Preparation

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 support 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