

Questions You Should Answer Before Conducting a Survey

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U.S. Customs and
Border Protection

Questions You Should Answer Before Conducting a Survey

1. What are the goals of this survey?
2. Where do I fit in?
3. What is the time frame for this survey project?
4. Who will respond to in this survey?
5. What is the communications plan for this survey?
6. How will this survey be administered to participants?
7. How do you plan to follow up with non-responders?
8. How will the incoming data be handled?
9. What are the plans for reporting the data?
10. Are there plans to follow up?



The Existential Question

You're probably wondering
Why I'm here
And so am i
So am i



Frank Zappa (1940-2003)

“You’re probably wondering why I’m here” from the album *Freak Out!*, 1966



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Kill the Survey

Is a survey the best way of getting information?



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1. What are the goals of this survey?

- What broad questions will the survey address?
 - Are customers satisfied with products or services?
 - How satisfied are employees in this organization
 - With leadership
 - With the information they receive
 - With the work itself?
 - With each other
 - Is a particular program working?
- How will the answers be used?



2. Where do I fit in?

My official title is “Survey Queen”



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2. Where do I fit in?

- Overall project/program management
 - Planning, coordination, oversight
- Limited technical assistance
 - Research or evaluation design
 - Survey review and question selection
 - Survey design and administration
 - Data analysis, interpretation and reporting



2. Where do I fit in -- and who else needs to be involved?



3. Who will respond to this survey?

- Who will be involved?
 - Organization
 - Organizational level
 - Occupational group
- How many will be involved?
 - Census—everyone in the organization
 - Sample—a subset of organizational members



4. What is the time frame for this project?

- When are the answers needed?
 - Do you have the resources needed to meet the deadline?
 - If not, can resources be added?
- What other surveys will be taking place at the same time?
- Are there recurring events or organizational stressors that will interfere with data collection?



5. What is the communications plan for this survey?

- Notify chain of command
- Notify respondents
- Invite respondents
- Send reminders to respondents



6. How will this survey be administered to participants?

- What is your primary delivery strategy?
 - Web-based survey platform
 - MS Excel or PDF “fillable form”
 - Telephone
 - Paper & pencil
- Will you need a secondary delivery strategy?



7. How do you plan to follow up with non-responders?

- What is your target response rate?
- What if you don't reach it?
 - Reminders
 - Extensions



8. How will the incoming data be handled?

- Who will be analyzing the data?
- What software will be used to analyze the data?
- How will the data be maintained?
- Who will have access to the data?



9. What are your plans for reporting the data?

- Who is the audience for survey results?
- How will the results be used?
- How will the results be delivered?
 - Formal report
 - Conference
 - Focus groups



10. Are there plans to follow up?

Should there be?

- Providing feedback
 - Briefings for sponsor or key officials
 - Town Hall meetings for respondents
 - Write-ups on the agency/office website
 - Formal reports

- Taking action
 - Planning meetings
 - Focus groups
 - Interventions
 - Subsequent administration of the survey



Next Steps

- If survey is **not feasible**
 - Discuss need for information
 - Recommend alternative strategies data collection
- If survey **is feasible**
 - Schedule survey planning meeting
 - Prepare project plan and time line



Questions?



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Questions You Should Answer Before Doing a Survey

- 1. What are the goals of your survey?**
 - What broad questions do you want answered?
 - Use of existing programs
 - Need for new programs
 - How will you use the answers?
- 2. Where do I fit in?**
- 3. What is the time frame for survey project?**
 - When do you need the answers?
 - What other surveys will be taking place at the same time?
 - Will recurring events or organizational stressors interfere with the survey?
- 4. Who will complete this survey?**
 - Who is the target audience for the survey?
 - Target organizations, organizational level
 - How many people will be completing the survey?
- 5. What is the communications plan for this survey?**
 - Notify chain of command
 - Notify respondents
 - Invite Respondents
 - Follow up if needed
- 6. How will the survey be administered to participants?**
 - Will you require primary and secondary survey delivery strategies?
 - Web-Based
 - Paper & Pencil
 - Telephone
 - Other?
- 7. How do you plan to follow up with non-responders?**
 - What is your target response rate?
 - What if you don't reach it?
 - Reminders
 - Extension
- 8. How will incoming data be analyzed?**
 - Who will be analyzing the data?
 - What software will be used to analyze the data?
 - How will the data be maintained?
 - Who will have access to the data?
- 9. What are your plans for reporting the data?**
 - Who is the audience for survey results
 - How will results be delivered?
 - Formal report
 - Conference
 - Focus groups
- 10. How do you plan to follow up?**
 - Action plans?
 - Subsequent surveys?

References

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Sample Size Calculators

<http://www.surveysystem.com/sscalc.htm>

<http://www.raosoft.com/samplesize.html>

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