Survey Development Checklist
SA³

Instructions
Use this checklist as you develop your survey. Although it is a checklist, the purpose of its use is not to “check” every item. Rather, the goal of this tool is encourage thoughtful reflection and consideration of critical aspects of the implementation of a survey. Checking all the items on this list will not guarantee a perfect survey, but the discussions you have regarding each item will help improve your survey process. Finally, the tool is not designed to be used alone - it is best discussed with a team.

Survey Purpose and Target Population
- You are clear about what you want to learn from this survey.
- A survey is the best or most practical way to gather the information you need.
- You are able (legally, practically) to contact members of your target population in a way (e.g. telephone, mail, email) in which they are likely to respond.
- You have (or can obtain) consent / permission from appropriate agency / organization to contact members of your target population.
- You have (or can gather) accurate contact information for members of your target population.
- You understand the target population sufficiently to be able to design survey procedures (such as incentives, contact methods, wording of communications, etc.) so that you will obtain a reasonable response rate.

Survey Contacts
- Multiple contacts are planned.
- Contacts include different formats (e.g., postcard and email), not just a repeat of the same contact format (i.e., 3 email messages).
- Survey contacts are personalized.
- Contacts build the trust of the target population by highlighting sponsorship by legitimate authority, the importance of the task, and invoke exchange relationships.
- Contacts support the rewards of participation, including positive regard, asking for advice, being clear about the rewards or benefits of the survey, and describe how results will be shared.
- Contacts reduce social cost of participating (avoid subordinating language, embarrassment, inconvenience, and risks to population).
- Contacts explain how the survey is relevant to the target population.
- The timing of the contacts gives the population a reasonable time to respond, but not so far apart so that the target population does not see how they are connected.
Survey Incentives
□ A prepaid token incentive is sent with one of the first survey contacts.
□ If an alternate type of incentive will be used (instead of prepaid token incentive), it is designed to create goodwill and social exchange (not payment for time).
□ The incentive you are offering is allowable under NDSU’s and your Department’s policies and all policies will be followed.
□ Appropriate accounting procedures are in place for the purchasing and tracking of incentives.
□ Appeals are made to altruistic and egoistic motivations to respond to the survey.

Survey Design
□ Design recognizes how members of target population are likely to respond (e.g., if users are likely to use a smartphone to complete survey, then survey is designed with limited scrolling required).
□ Branching or routing is used to avoid asking questions that are irrelevant to some respondents.
□ Survey uses principles of good design (easy to read, clear instructions, definition of unusual terms, plenty of whitespace, uses NDSU branding, etc.).

Survey Items
□ Items are likely to be interpreted in the same way by all respondents.
□ Respondents are willing to answer items.
□ Respondents can provide accurate answers to items (e.g., don’t require substantial calculation or recall of behavior over a long period of time).
□ Items use response format (open-ended, check-all-that-apply, scale, etc.) that best provide the information desired.
□ Items use complete sentences and simple words.
□ Item quantifiers, where used, are precise (but not overly), and use non-overlapping ranges.
□ Double-barreled items are avoided.
□ Items use neutral language.
□ An equal number of “positive” and “negative” categories are used for response options.
□ Response categories are aligned with the question stem.
□ “Does not apply” and “neutral” categories are used appropriately.
□ Demographic information is pulled automatically from database and not asked as question in the survey. Demographic information used is relevant to the purpose of the survey and is not included “just because.”
□ Demographic items (if needed) are placed at the end of the survey.
□ Question ordering makes sense to respondents. First question is interesting, applies to everyone, and is easy to answer.