Common Decisions for Survey Design (Qualtrics Example)

When planning a Qualtrics survey, a researcher makes decisions similar to those listed below. Adapt this guide as needed to facilitate Qualtrics data collection specific to your study, or to data collection using other methods.

Tip: Some decisions may affect whether you need to submit a protocol to Purdue's IRB to then move on to collecting data or this information may be helpful while completing your protocol documents.

Decisions	Options	Comments/Questions
Who is in the study population?	• A preexisting list (e.g., scholarship recipients). • Create a list (e.g., event attendees). • No list	• When can this list be obtained/created? • Who will obtain/create the list? • What identifiers are needed (e.g., PUID? Email?)
Who is in the sample?	• A subset of the population • Identify inclusion and exclusion criteria. •	• Can I justify targeting the full population? • What count of responses do I need? • What rate of response do I expect/need? • What is my strategy to create a random (or other) sample? • What are inclusion or exclusion criteria that may affect my sample?
Are participants' identities maintained?	• Anonymously throughout	• A general link is used to promote the survey and identities are not saved in the survey. • A contact list is optional, but required if a profile of targeted participants is needed.
	• Identified by choice	• An anonymous link is used to promote the survey. • Participants may identify themselves (e.g., input their PUID) or aspects of their identity (e.g., gender identity, race/ethnicity, age or age bracket) within the survey. • A contact list is optional, but required if a profile of targeted participants is needed, or if the intent is to match self-identified respondents with other data.
	• Identification required	• Utilize either or both of the Qualtrics emailing function and/or placing the survey behinc log-in. • A unique link is provided to each participant (check your survey settings). • A contact list is required. • Identifiers (from the contact list) can be merged with the survey results by Qualtrics.

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Decisions	Options	Comments/Questions
How will participants be notified of the survey?	• E-mail distribution through Qualtrics • Personal e-mail • Other promotion (in a document, oral promotion, etc) • Paper-based alternative	• Is IRB approval is required? If yes, include components of the informed consent within the message. • Reminders may be sent, but consider whether your identification option will result in participants getting the reminder after completing the survey. • Consider other non-e-mail promotions as a way to better inform participants. • If using e-mail, consider from whom, and with what subject line the e-mail should be sent to garner the most interest of participants.
Do I incentivize participants?	• No incentive • Select participants receive an incentive • All participants receive an incentive • Respondents opt in to or out of the incentive	• Is the incentive "enough" to motivate honest responses but not seem to coerce respondents? • Do I have the resources/support to offer this incentive? • How will I distribute this incentive? • If incentivizing an IRB approved study, consider these compensation guidelines: https://www.irb.purdue.edu/docs/203_compensation.pdf
What introductory text should appear in the survey?	• Informed consent	• If IRB approval is required. (see "consent template" at: https://www.irb.purdue.edu/forms/)
	• Other text	• When IRB approval is not required, the introductory content of your survey should establish rapport and trust (the people/unit asking for this information is legit) and ensure that the data will be immediately applicable to the constituents' experiences at/with Purdue..
What is the survey content?	• All close-ended questions • All open-ended question • A mix of close- and open ended questions	• If using a pre-existing inventory of question/answers or survey items, obtain permission to use the survey items. • If creating new questions, refer to the tips covering question types. • Draft your content without regard to length; be inclusive of all the possible content you need. You can reduce length later, by prioritize the core content.
How should the survey be terminated?	• By a set deadline. • By a rolling deadline (ex: 2 weeks after invitation) • No deadline (on-going data collection)	• For pre-tests, complete data collection before the intervention has begun. • For post-tests, start data collection after the intervention has concluded. • How will length of availability affect desired participation rates? • Consider an appropriate length of time, but not too much. (i.e., avoid "I'll do it later" syndrome.) • If no deadline, still encourage a response within a given time frame. • If the survey itself does not terminate, consider whether a person's access to the survey terminates. • For assessment within phases, ensure data are collected with the completion day/time recorded.

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Decisions	Options	Comments/Questions

Do survey item prompts make sense?
 	
Do options in the response scale align with the prompt?
	• Get feedback
	• Consider various response scales- Likerts of agreement, frequency, likeness/similarity, etc.
		• You could wait to get responses before you find out what is wrong, or ask for help from possible respondents or other colleagues to edit your content; review is highly recommended (aka, protocol testing). When seeking review:
		  ○ Ask the reviewer to "think like your participants." For example, if your participants are first-year students, asking reviewers to think like a first-year student will help them give you better feedback or better yet, have some second year students review the content
		  ○ Seek input for ways to simplify the language- no jargon.
		  ○ Test all possible conditions (skip logic, display logic, etc.).
		  ○ Test your piped text by creating a "test" contact list with values close to the data.

What tense do I need in each prompt?	• Past, present, or future	Ensure the wording of survey items matches the content. For example, suppose you wanted to know about students' frequency of using study StrategyX. At different times, the prompt could be: • *"How often do you intend to use StrategyX*?" If asked before an academic period begins. • *"How often are you using StrategyX?"* if asked during the academic period. • *"How often did you use StrategyX?"* if asked after the academic period ends.
Is the time to complete the survey reasonable?	• Short, medium, or long; brief (3-5 questions) or exhaustive (200+ questions).	• Is each survey item essential to the study purpose? If not, what can I do to shorten the survey? • How long does it take a pool of sample survey takers to complete the survey? • If the survey is lengthy, consider whether it's reasonable for subsets of participants to receive shorter versions of the survey.
Is the survey content "easy?"	• Readability • Flow • Clarity • Understanding	• Remove unnecessary jargon, technical terms, wordiness, and negation. • Test all possible flows through a survey. Simplify and shorten everywhere possible. • Use a progress bar to help participants understand what to expect.

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<table>
<tr><th>Decisions</th><th>Options</th><th>Comments/Questions</th></tr>
<tr><td>Is my survey unbiased?</td><td>Biased or unbiased options
Leading
Issues around recall or the halo effect</td><td>Many forms of bias exist, and survey content can easily, even if unintentionally, bias the results. For example, Does the survey contain:
Polarizing statements or prompts? AKA, extreme response bias
Unnecessary adjectives?
Unbalanced scales?
Social acceptance bias
Predict how participants could reply, and make sure survey items are inclusive of all possible responses.
Do your questions ask respondents to think too far back, to a particular experience or similar (aka, response bias)?
Do your questions or topic lead respondent to respond to a series of questions about an experience based solely on their feeling about one attribute?</td></tr>
<tr><td>What language should I use?</td><td>English
Other</td><td>Conduct your survey in English, unless you have a specific reason to use another language. For help with language in Qualtrics, see: https://www.qualtrics.com/support/survey-platform/survey-module/survey-tools/response-management-tools/translate-survey/</td></tr>
<tr><td>How will I analyze these data?

How will I report results?</td><td>Descriptives (n and %)
Mean, median, mode
Standard deviation
Inferential analysis</td><td>You may not need to know the details of your analyses, but predicting your analysis may help you prepare the dataset for analysis. Consider:
What Qualtrics items are collecting data that I already possess? (e.g., if Qualtrics data are identified, can I merge in the needed demographics?)
What data need to be merged with the Qualtrics results? What variables are needed for merging?
Have I collected data in a way that fits my predicted model for analysis?</td></tr>
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Need additional help? For specific help with Qualtrics:

- Contact: idata@purdue.edu or
- Use the Qualtrics website
- FAQ about using Qualtrics