



Quick Tips

Survey Procedures

Surveys are a structured way to collect information using questionnaires. Typically surveys are conducted through the mail (surface or electronic) or by phone.

A survey is used:

- To collect standardized information from large numbers of individuals
- When face-to-face meetings are inadvisable
- When privacy is important or independent opinions and responses are needed

Preparation and supplies

- Be clear about the purpose of the survey and the information you want to collect.
- Carefully craft the questions and format the questionnaire so it is concise and attractive.
- Pilot test the questionnaire with individuals similar to the survey respondents.
- Prepare the cover letter to include purpose and use of the survey, identification with UW-Extension, and asking respondents for their valuable assistance – how important their response is to the success of the survey.
- Assure confidentiality.

Supplies needed include:

- Questionnaires, letters, postcards, envelopes, postage-paid stamped return envelopes

Response rate often is low in mail surveys unless care is taken in preparation and there is persistent follow-up. Since those who reply may not be typical of the population, care is needed in interpretation of the results. See Quick Tips 1 and 2.

There are six main elements to think about when planning a survey: target population, sampling, distribution, questionnaire design, data analysis and management. The following guidelines are based on Dillman's Total Design Method:

Procedure

Mail Survey

1. Form team for designing and implementing the survey.
2. Compile list of respondents.
3. Draw sample (if used).
4. Produce mailing labels, numbered sequentially. Determine how many follow-ups you will do and prepare that many sets of mailing labels: first mailing, reminder card, follow-ups and master list.
5. Develop questionnaire.
6. Pilot test questionnaire and modify.
7. Develop cover letters and postcard (typically there is the initial cover letter, a reminder postcard and follow-up cover letter(s)).
8. Print questionnaires, letters and postcards. Prepare envelopes.
9. Number questionnaires sequentially.
10. Stuff and send first mailing (match number on questionnaire with number on master mailing list). Include postage-paid return envelope.

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11. After one week, mail reminder postcard.
12. Remove names of respondents from subsequent sets of mailing labels.
13. After three weeks, stuff and send second cover letter and questionnaire to those who haven't responded.
14. After five weeks, stuff and send third cover letter and questionnaire (as appropriate).
15. Summarize response rate.
16. Code and tabulate questionnaires.
17. Analyze and interpret data.
18. Report findings.

Telephone Survey

1. Form team for designing and implementing the survey.
2. Compile list of respondents.
3. Draw sample (if used).
4. Develop questionnaire.
5. Pilot test questionnaire and modify.
6. Develop introduction.
 - Identify yourself by full name and organization, UW-Extension.
 - Establish that correct respondent is on the phone.
 - State the purpose of the call and assure confidentiality.
7. Duplicate questionnaires.
8. Write telephone numbers on questionnaires.
9. Train interviewers, as appropriate.
10. Collect data.
11. The best times to call are between 4 and 9 P.M. weekdays, 10 A.M. and 4 P.M. Saturdays (no Sundays).
12. Summarize response rate.
13. Code and tabulate questionnaires.
14. Analyze and interpret data.
15. Report findings.

References

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