

SURVEY DESIGN BASICS

with Dr. Kirsten Lee Hill, Ph.D.

SURVEY POWER HOUR



Typically, this material is covered over 8 hours, allowing for in-depth exploration and lots of hands-on practice. **Today, we'll focus on the essentials you need to get started, all within just one hour.**

My goal is to provide you with a solid foundation in survey design, giving you the key insights and processes to begin crafting effective surveys right away.



WHY DOES GOOD SURVEY DESIGN MATTER?



BEFORE:

How did you hear about Qwoted?

- ☐ Online / advertising
- ☐ Through a colleague
- ☐ Through an email
- ☐ Through social media (Twitter, Facebook, LinkedIn)
- ☐ Events
- ☐ Other: _____



MARK-UP:

How did you hear about Qwoted?

- ☐ Online / advertising
- ☐ Through a colleague
- ☐ Through an email
- ☐ Through social media (Twitter, Facebook, LinkedIn)
- ☐ Events
- ☐ Other: _____

Colleague is "who" not "how."

This choice groups a bunch of social media platforms together. It would be more useful to know which specific platform people heard about Qwoted on.

All of these options overlap to some extent. Email and social media are both online, a colleague could overlap with email or social media, and advertising can take place on social media platforms.



AFTER :

How did you hear about Qwoted? *Check all that apply.*

- ☐ Online search
- ☐ Advertisement (Ad)
- ☐ Newsletter
- ☐ Event
- ☐ Recommendation from someone I know
- ☐ Other, please describe: _____

Where did you see an ad for Qwoted? *Check all that apply.*

- ☐ Google
- ☐ Twitter
- ☐ Facebook
- ☐ LinkedIn
- ☐ TikTok
- ☐ Instagram
- ☐ Other, please describe: _____



BEFORE:

How would you rate our specialist who helped you?

1 - Poor

2

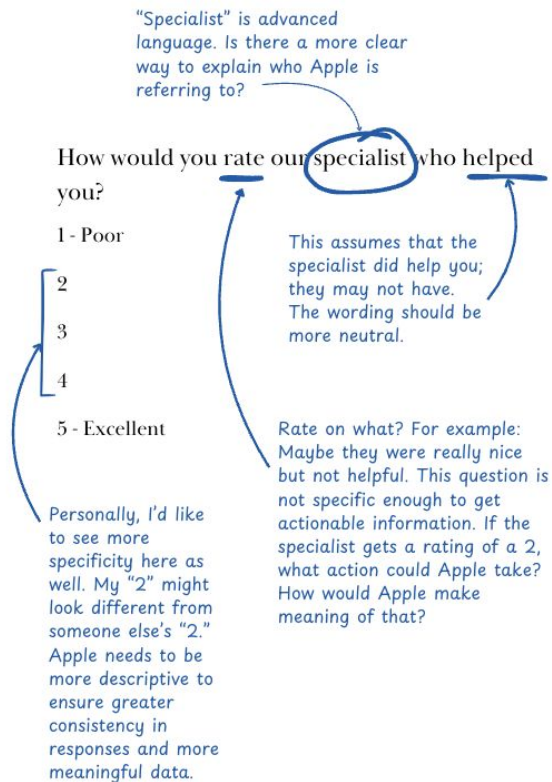
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4

5 - Excellent



MARK-UP:





AFTER:

Which of the following describe your experience with the Apple support person you recently talked to? *Select all that apply.*

- ☐ They solved the problem I was having.
- ☐ They were easy to understand.
- ☐ They were friendly.
- ☐ They replied quickly to me.
- ☐ None of the above.



5 STEPS TO DESIGN A GOOD SURVEY

1. Get clear on your goal(s)
2. Clearly define what you want to measure
3. Explore your options
4. Build your survey
5. Review your questions

1

GET CLEAR ON YOUR GOALS

Start with your “who.”



SURVEY PURPOSE STATEMENT

The purpose of [name of your survey] is to collect data from [describe who will be taking your survey].

Be sure to think about key characteristics that matter. Here are some examples:

- Participating in your program/have bought your product
- Age
- Gender
- Race/ethnicity
- Location (city, state, country; rural, urban, suburban)
- Role (e.g., leadership, staff)
- Many others!



GET CLEAR ON YOUR GOALS

What is your goal for this survey?

- Why are you creating this survey?
- What do you want to learn?
- How will you use this information?

If you are still stuck, it can be helpful to think about the stat(s) or statement(s) you want to be able to share.



GOALS

Here are the four types of survey goals I commonly see:

1. **Basic Info**—collecting *demographics* (age, race, ethnicity, gender, education, income, etc.), prior experience, contact information, and other details from people to better understand individuals or a group.
2. **Feedback**—asking people to share their opinion on a product, a service, an event, or something else to learn what you are doing well and how you might improve.
3. **Describe**—asking questions to better understand how people experience or have experienced the world around them, or to have them self-reflect or self-assess.
4. **Impact**—asking questions to measure change or evaluate the difference your work, an initiative, a product, etc. may have made.

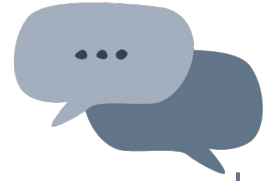


GOALS

For example, let's consider the onboarding survey I use for my company.

The purpose of my onboarding survey is to collect data from clients. My goals are to:

1. Collect basic background information on clients (name, pronunciation, best contact information). **(Basic Info)**
2. Understand what goal(s) my clients have for our work together (what do they hope to learn, accomplish, etc.). **(Basic Info)**
3. Assess people's knowledge of survey design. **(Describe)**
4. Measure people's confidence in survey design. **(Impact)**



LET'S CHAT

Questions?

DEFINE WHAT YOU WANT TO MEASURE

Consider what you want to learn or share.



DEFINE WHAT YOU WANT TO MEASURE

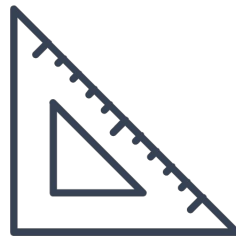
Once you are clear on your goals, it's time to break them into what I call the “shareables.” These are the clear learnings or takeaways you want to be able to speak to, use to make decisions, or report (share) for each goal.

Here, you still aren't yet thinking in terms of the questions you want to ask. You are focusing on breaking your goals down into smaller categories that describe what you want to learn in greater detail.



EXAMPLES

Goal	Shareables
(Describe) Assess the quality of relationship between a coach and the teacher they are supporting	Average amount of time teachers and coaches spent together
	The topics teachers and coaches work on together (most frequently and least frequently)
	Strength or quality of the relationship between a teacher and coach
(Feedback) Learn how to better support teachers	How useful teachers find the supports offered
	What additional supports teachers would like to see
(Describe) Measure how confident teachers feel in the classroom	How confident teachers feel managing behavior as compared to leading instruction
	Parts of teaching that teachers are the most and least confident in

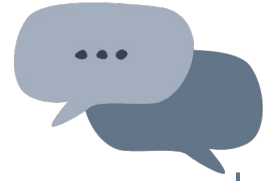


THIS



NOT THIS





LET'S CHAT

Questions?

FROM SHAREABLES TO QUESTIONS

Get drafting. Don't worry about being perfect.

THINGS TO ASK YOURSELF?

What do you want to know? And, how can you best get that information?

- Does it make sense for this question to be open-ended or closed-ended?
- If closed-ended, what type of answer choices (responses) do I want?

EXAMPLE SCALES



- **Agree/Disagree:** Strongly Disagree, Disagree, Agree, Strongly Agree
- **Importance:** Not important, A little important, Somewhat important, Very important
- **Usefulness:** Not at all useful, A little useful, Somewhat useful, Very useful
- **Frequency:** Never, Rarely, Sometimes, Often
- **Frequency (more specific):** Never, 1-2 times, About every week, Multiple times per week, Every day
- **Prioritize/Rank:** People pick their top three or five (or another number) from a list or rank all options in an order of preference
- **0 to 10 Rating Scale:** 0 (not at all) to 10 (extremely)
- **Slider Scale:** Range of numbers; people drag a “slider” to choose a number.

START DRAFTING YOUR QUESTIONS

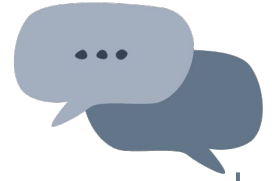
Goal: (Impact) To understand people's knowledge of survey design.

Shareable: How confident people feel designing surveys on their own

Draft Question: How would you describe your comfort level with survey design?

Draft Response Choices:

- I have LOTS of questions. I don't know where to start.
- I have some questions. I feel like I am still learning this.
- I feel like I know this pretty well.
- I know this VERY well. I feel like I could teach it to someone else.



LET'S CHAT

Questions?

PREPARING FOR SURVEY ADMINISTRATION

Pilot (test) your survey

SURVEY LAUNCH CHECKLIST



- ☐ Survey launch checklist
- ☐ Draft
- ☐ Internal feedback: Team review (if applicable!)
- ☐ Refine draft
- ☐ Pilot Your Survey: Cognitive Labs or Focus Group
- ☐ Refine draft (at the end of ALL feedback)
- ☐ Internal feedback: Team review (if applicable!)
- ☐ Finalize survey
- ☐ Put into BlockSurvey
- ☐ Test (preview) in BlockSurvey platform
- ☐ Decide how/who to send the survey to and collect any information you need (like email addresses)
- ☐ Draft your survey invite language (the email or text you will use to send the survey to people)
- ☐ Send!



COGNITIVE LABS

Here's how it works: Find someone similar to the people Who will be taking your survey.

Ask them to read through your questions and think aloud about how they'd respond. This allows you to flag any confusing wording or questions.

The person will literally read each question and response option out loud and then narrate all the thoughts they are having as they think through and choose their answer.





QUESTIONS TO ASK:

Here are questions you can prompt on if the person doesn't naturally narrate these aloud.

1. Was there anything confusing about the question?
2. Did you understand the words used in the question, and do you think others would understand it?
3. Did you have any trouble fitting your answer with the response options? If so, are there response options you'd prefer?
4. Is there anything missing that we should have asked about? For example, when we ask about types of coursework available at your school, is there any activity in particular you think is important that we do not include?

TEST YOUR SURVEY



I always recommend that you test your survey BlockSurvey a handful of times (more, depending on if you use complicated features) to make sure everything is working how you want.

During this process, you may realize there are tweaks you need to make to your questions—that's okay!



THANK YOU.



Thoughts? Questions?

[Feedback Survey](#)

ADDITIONAL RESOURCES



Additional Resources:

- Survey Design 101 Course (code: BlockSurvey20 for 20% off)
- Question Makeover (review of your survey draft)
- *Ask Better Questions* book out September 19th.



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CREDITS



Presentation template was adapted from [SlidesCarnival](#) - an amazing free resource with special touches from [Canva](#) icons and [Giphy](#) images.



WHO AM I?

Dr. Kirsten Lee Hill

- Ph.D. from the University of Pennsylvania
- Millions of dollars raised through grants for research and innovation
- 150+ innovators coached on measurement and evaluation
- Thousands of survey items launched around the country

