SURVEY TIPS AND TOOLS
GENERAL GUIDELINES
FOR CONDUCTING A SURVEY

☑ BEFORE YOU JUMP INTO IT...

Begin at the end. Ask yourself (and especially others who will be using the survey to make decisions) “What do I need to know when this study is complete that I don’t know now?” The answer to this question will drive many of the decisions you must make along the way. Other questions to ask:

- How much money do I have to spend?
- How important is the statistical reliability of the results?
- What information will I get from this survey that I can’t get from other sources?
- How much time do I have to complete the study?
- Who will be surveyed, and how will I reach those people?

☑ WHEN YOU’RE READY TO START...

- Meet with those who will use the survey results to identify the issues to be addressed. Though tempting to everyone involved, it’s best not to get into the specific wording of questions at this point—it interrupts the “brainstorming” of issues and can be excruciatingly tedious as well. Offer up front to come back at a later date with a draft of the survey for review and comment.
- Determine the type of survey to be conducted: mail-out, mail-back; telephone; personal interview.
- Design the survey instrument, keeping in mind the importance of proper wording and ordering of questions, the length of the survey (shorter surveys = higher response rates), and whether each question falls in the “essential” or “nice to know” category.
- If the survey is to be of a random sample of a population, determine the appropriate sample size and select the sample. If you will be comparing responses between two or more groups (such as those living in the northern part of the city compared to those in the south), make sure the sample size of each group is adequate.
- Finalize the survey instrument after pretesting it with at least 20 respondents.
• Administer the survey.
• Process the completed questionnaires, checking for completeness and coding responses where necessary (such as open-ended questions).
• Enter the data into the computer.
• Using the statistical software package of your choice, develop programs to tabulate the results.
• Report/analyze the results. In a written report, include a copy of the survey instrument, frequency distributions of responses to all questions (whether each one is discussed in the text or not); and a description of the survey and sampling methodology (how and when the survey was conducted, how respondents were selected, the response rate, etc.) An executive summary is very helpful for those who don't want to wade through a lot of text and numbers to get the highlights of the study. Graphics, in the form of charts and maps, help break up the text and help the reader focus in on the most important points.

 ✓ SANDAG has assisted many local agencies in survey design and analysis through the Local Technical Assistance (LTA) program. For more information about survey assistance and others services offered through the LTA program, please call Karen Lamphere at 595-5355 or e-mail kla@sandag.cog.ca.us.