Project Planning Considerations

Research Goals
- What do you need to know? List your primary research questions and think about *why* you want the answers to those questions. How will the resulting information be used?

Funding
- What resources are available? Balance between what you want and what you can afford.

Sample
- What type of sample will be used?
- Do you need a probability sample or will non-probability work for you?
- Is the sample (and necessary pieces of information) available?
- Sample size needed for analysis.
- Sorting/Stratification.

Survey Questionnaire
- Use a Case ID to track each respondent.
- Minimize open-ended questions. Provide answer options if possible.
- If Paper: Pre-code where possible (number the answer options).
- If Paper: Include clear skip instructions.
- Group types of items.
- Minimize redundancy. More is not necessarily better.
- Questions must be clear and understandable and fit any answer options provided.
- Questions must be "answerable" by the respondents.
- Consider respondent burden. Only include what is necessary. (How will the information be used?)

Mode of Data Collection - Features and Tips

<u>Web Surveys</u>
- Limited to samples of web users. Not always appropriate.
- Use unique case ids and passwords for security and integrity of survey.
- Can send paper letter as well as email notification. (Visible reminder is helpful.)
- Follow-up procedure is important (minimum of 2 reminders)

- Use consistent format with minimal glitz.
- Include confidentiality statement and contact person in case difficulties arise.
- Test on different browsers and devices.

Mail Surveys
- Follow-up procedure is important. Minimum of two follow-up contacts.
- Printed survey should have sufficient white space and be easy to read.
- Use consistent format throughout (font, bolding, numbering, etc.).
- Minimize skips. Make necessary skips as clear as possible.
- Include cover letter and pre-addressed/postage-paid return envelope along with the survey.
- Incentives can increase response rate.

Telephone Surveys
- Introductory script should include caller's name, organization, purpose of the study, length of interview, confidentiality statement.
- Record all attempts to reach each respondent.
- Advance letter is very helpful if list sample is used.

Letters (Emails, Advance or Cover Letter)
- One page, include name of organization and purpose of study. Keep emails short.
- Include confidentiality statement, voluntary participation.
- Person to contact if respondent has any questions.
- Simple content (no jargon)

Institutional Review Board (IRB) requirements.
- IRB approval required for human subjects surveys.
- Human subjects certification required for researchers and staff.