Methods Guides

How to run a survey

Introduction

This guidance is for any staff member interested in holding a survey for the purposes of evaluating Teaching, Learning and the Student Experience. It aims to outline and help you to consider the steps you can take before, during and after to ensure you run a successful survey.

What is a survey?

Surveys typically involve the collection of a relatively small amount of information in a standardised form from a relatively large number of people.

Why run a survey?

Surveys are particularly suited to answering questions about the numbers, proportions, and frequencies of people hold a particular view or changed their behaviour and perceptions after a particular intervention. Where possible, it is helpful to engage with E&I Framework, framing your survey questions around the five levels of impact.

You can use surveys to collect factual, attitudinal and longitudinal data and to explore the reasons behind people's initial answers. Surveys are useful to:

- Generate numerical data on a wide range of topics quickly, at relatively low cost, especially if done online
- Give anonymity to respondents
- Gather contact details for follow-up interviews or focus groups
- Make comparisons across groups and subgroups

When not to run a survey?

A survey has several disadvantages, you need to be aware of them and understand their possible bearings on the quality of data. Here are the key reasons for considering other methods rather than a survey:

- Response rate may be low, especially when surveys are administered online. Very low responses rates of a survey carry the possibility of biased results. This will seriously reduce the usefulness and credibility of the results.
- Surveys are less useful to explore issues in depth. This is especially true where there is little knowledge about a topic.
- The required data sets are already available and accessible. It is cost-effective where possible to use institutional research and evaluation data such as institution wide student surveys (e.g. NSS, UKES, PTES), student evaluation (e.g. module/programme evaluation) and learning analytics (e.g. attendance data, retention, VLE use, and attainment data).
- Risk of survey fatigue. Students might be already overwhelmed by the sheer volume of request for feedback.

Running a survey (before, during and after)

This section outlines some of the key considerations to make at each stage of the process.

Preparation

First, consider what are you trying to achieve from a survey:

- What is it you want to explore?
- What do you already know?
- What else do you need to know?
- Who should be involved?
- How much will it cost?
- How much time will it take?

The content and priority of the survey should be decided through identifying and consulting with intended survey results users and their intended uses. These are likely to include the programme directors, funders, managers, students and staff stakeholders. This may vary between individual contexts.

Once you have decided to run a survey, make sure you refer to the guidance note on institutional research and evaluation policy for further details such as whether or not you need approval before starting your survey. If it is research, you will need ethical approval in order to run your survey. If the survey is not research, solely for the purposes of teaching and learning, or it constitutes Clinical or Social work practice and audit, then it does not require ethical approval (see the Annex E in the Guidance Notes for further details). However, appropriate procedures must be in place for the people involved to give their consent to the activity.

If possible, it is better to explore, use or adapt existing survey instruments that have been used for similar purposes. Once you want to design your own survey instrument, the following are some basic principles to bear in mind:

- **Wording.** Make sure that the wording, tone, language, layout and structure of your questions are appropriate for your audience. This is especially important for those where English may not be their first language.
- **Length**. Keep your survey focused, simple to complete and short- no more than two pages. This will maximise the number of responses and minimise the time taken to analyse it.
- **Question order.** You also need to think about the order of your questions. This will influence people's answers to later questions. Design the survey as a funnel, moving from simple, unthreatening and non-sensitive questions, to those that require more thought and maybe more personal information.
- **Question format**. Consider a mix of 'closed' and 'open' questions, where people enter their response in their own words, as this helps to keep people interested.
- **SMART questions**. It is important to ensure your questions are SMART enough, that is, specific, measurable, achievable, realistic and time bound.
- **Ending.** Make sure your respondent has the chance to say what is on their mind e.g. by using a general open-ended question at the end.
- **Pilot.** Your survey should be tested to ensure it is fit for purpose and jargon free. Piloting it with your colleagues or a small sample of students (e.g. Student Reps) will provide some useful feedback on how to clarify any difficulties they faced responding.
- **Incentives.** Incentives can be an effective way to increase the response rate. If you decide to use an incentive, money tends to be more effective as an incentive. Evidence also suggests that small amounts of money have a positive impact on the response rate, but larger amounts do not necessarily improve the response rate any further.
- **Data collection method.** If you prefer online surveys over paper ones, there are a number of popular online survey platforms provide opportunities for hosting your survey (e.g. MS forms, Jisc

online surveys, Google forms, SurveyMonkey, etc.). Further guidance on MS forms can be found at the University's Blackboard learn.

Before distributing your survey, these issues may be considered to ensure meaningful results.

- **Sample choice**. Be mindful of your sample choice - who do you need to answer the question and try to minimise the danger of sample bias where responses are not representative of the broader group. The representativeness of the survey sample is more important than the percentage of responses. This is not to say that response rate is not important. The higher the response rate, the more accurate of your results will be and anything over 65% is very good.
- **Sample size**. As a guideline, a survey will need a sample of 30-500. For survey analysis involving groups, a minimum acceptable number for comparison or relation is about 30 in each group. If your activity has a small number of participants, attempting to collect information from everyone involved is a good way to avoid bias.
- **Access to the sample**. You need to consider the availability of your potential participants and identify the person who can provide access to your target participants.
    - In case of a large population, you may need contact information such as e-mail address for your survey or file access for database research. A good place to begin is the institutional registrar's office (e.g. RISIS, PSO, TRENT(staff)).
    - If you choose to email your surveys to the participants, ensure it is accompanied by a covering letter (see the appendix for details). Also experience shows that emails sent to specific individuals yield higher response rates than pop-up surveys.
    - For small, live events, it is a good idea to distribute your surveys at the start and encourage attendees to complete and return them at the end of the event. This ensures a very high response rate. Do take this opportunity to explain the purpose, relevance and importance of the survey as you have direct contact with the participants.
- **Plans for low response rates**. It is also useful to have reminder letters ready to go when the response rates are low. You may consider sending 2-3 reminders for a survey that is open for approximately 4-6 weeks to achieve a high response rate, but not irritating your recipients with too many rounds of communication.
- **Data protection and ethical issues.** Surveys should respect and protect the rights and welfare of any participants. Give your participant time and information to decide independently whether or not they wish to participate without any pressure. You also need to be aware of the Data Protection Act and adhere to regulations and procedures relating to data protection and information security. Any queries regarding Data Protection should be referred to imps@reading.ac.uk for advice.

It is also important to set deadlines for key steps involved in this stage and assign responsibilities for each step:

- Date by which surveys must be constructed
- Schedule of any necessary training if required
- Who is responsible for data collection (e.g. sending out surveys and ensuring their return)?
- Schedule for data collection and follow-up. Repeat surveys at the same time of year as previous ones if appropriate, using the same sampling frame. Follow up with individuals who do not replay at first, possibly with two or three reminders to improve the response rate.
- Deadline for receipt of survey data
- Deadline for organising data analysis
- Schedule for sharing findings with the appropriate stakeholders

Running the survey

Once you send out your survey, you should monitor the responses as they come back and determine whether and when to send reminder letters. You might need to send a reminder message if the expected response rate has not been achieved.

Afterwards

When you have collected the required information, you then need to go through a series of steps that contribute to data management.

Data entry, storage and organisation- Determine the approach that will work best to enter, store and organise the data collected.

- **For online surveys**- in most cases, the data can be automatically collated.
- **For paper-based surveys**- scans or digital images should be created as a back-up to ensure data are safeguarded.

Store data in a secure location- The benefits of a well-maintained dataset can be essential for continuity and stability as staff can change. It also enables longitudinal or comparative studies through the use of previously collected data which can be accessed and re-used. Click here for the University's Information Management and Policy guidance.

Analyse your data - Once the survey results are entered into the dataset, the simplest way to analyse small datasets is to use spreadsheets to summarise individual variable and identify patterns and trends through calculating totals, averages, percentages and frequencies. This analysis can usually be managed in Excel.

More advanced analyses (comparing groups, looking at the difference between subgroups, or controlling for extraneous factors) can be performed in statistical software such as SPSS (Statistical Package for the Social Sciences).

As for any open-end questions in the survey, you may need to engage in thematic analysis. You can read through each response, organise similarly responses into categories, and identify common themes and idea of these categories. Most online survey services also permit users to perform basic descriptive analysis and crosstabulation, as well as download raw data for further analysis using programme software.

Making changes- If you would like to make a change as a result of your survey, work in partnership with your students to identify how this could best be achieved. Utilise the E&I Framework for any changes planned.

Whether making changes or not, remember that it is essential to close the feedback loop to the participants. The Closing the Feedback Loop Guidance can help you consider ways to do this effectively.

Practicalities checklist

Format and wording of questions. Have you…	
Included 'don't know' options when necessary? For most questions this will be a valid response.	
Included 'none of these' options on multiple response lists (where this could be a valid response)?	
Included a category of 'other', 'unsure' or 'neutral' when necessary?	
Added an instruction asking the respondent to 'tick one only' for single-response questions?	
Added an instruction asking the respondent to 'tick all that apply' for multiple-response questions?	
Assigned labels to each rating scale (where this can increase the accuracy to respondents) for scale-questions?	
Included the 'not applicable' option when necessary? For questions about performance this will be fine; but for questions about opinion, everyone should have a view.	
Used too many open questions likely to cause an unreasonable amount of coding?	
Used too many open questions likely to put an unreasonable burden on the respondents?	

Overview	
Preparing. Have you considered… Who you plan to gather data from How you will reach your sample When the survey will open and close How you will distribute your survey and manage survey data How the survey data will be used Ethics approval The levels of impact can be answered through a survey The Incentives Having a back-up plan ready to go if responses rates are low	
Developing your survey. Have you… Explored existing survey instruments Ensured your questions are SMART, addressing multiple levels of outcomes where appropriate Worked on question wording, ordering and layout Piloted your survey and recorded completion time Written a cover letter/introductory statement and reminder letters (if response rates are low)	
During. Have you… Distributed your survey. Be sure to include instructions for return (address and date) Send reminder letters if response rates are low Initiate a low response plan.	
After. Have you… Organised and collated your data Stored your data in a secure location Analysed your data. Most survey data will be analysed via online survey tools, but you may need to engage in thematic analysis for any open-ended questions. Considered sharing findings and making changes	

Next Steps

Some further reading:

Harvey, J. (1998). Evaluation Cookbook. Edinburgh: LTDI. Available at: http://www.icbl.hw.ac.uk/ltdi/cookbook/cookbook.pdf. - An accessible guide which covers focus groups as well as other evaluation methods.

Fink, A. (2016). How To Conduct Surveys: A Step-by-Step Guide (6th ed.). SAGE: London. – This textbook explores the main stages in the survey life-cycle, looking at the focuses, process and credibility of surveys that are essential aspects to attend in running surveys.

Appendix 1- Contents for the covering letter

It is important that you write a covering letter or email with your survey. It should:

- Introduce you and the institution/School/Function you are representing
- Describe in two or three sentences the main objectives of the survey
- Explain the relevance of the survey
- Cover any general instructions
- Indicate that participation in the evaluation/survey is voluntary
- Assure respondents of the anonymity of the information provided by them
- Provide a contact number in case they have any questions
- Give a return address for the questionnaire and a deadline for its return

- Thank them for their participation in the evaluation/survey