

Hands On 3 Instruction Packet Survey Creation

In this exercise, you will gain experience with **creating surveys in Qualtrics**, the leading professional survey software used everywhere from academia to corporations to nonprofits. You will design a survey to test the relationship between personality and students' college experience. To do so, you will select an existing scale measuring one of five major personality dimensions and write your own questions assessing a specific aspect of students' academic or social experiences in college. You will then program both the personality scale and your own questions into Qualtrics to create a complete survey.

Part I: Select your variables and write questions

1. Download the "Hands On 3 - Questions" document from Courseworks.
2. You will be designing a survey to test the correlation between a personality dimension (variable 1) and a specific aspect of students' experience in college (variable 2). First, you will need to decide which two variables you want to measure through your survey.

For your personality variable, choose one of the five major personality dimensions according to the five-factor ("Big Five") model of personality: extraversion, agreeableness, conscientiousness, neuroticism, or openness to experience. See pages 14-15 for descriptions of each of these personality dimensions.

For your college experience variable, choose a specific aspect of people's feelings, behaviors, attitudes, or beliefs in college. It must be something that people are able to self-report in a survey. You can come up your own or choose from one of these:

- Procrastination
- Academic anxiety
- Social involvement on campus

You should **choose two variables that you hypothesize are related**. You do not need to do background research; you can base your hypothesis on intuition. However, if you would like to do a literature search to inform your hypothesis, feel free.

→ If you are working together, choose your variables together. Discuss which variables to choose and why you think they might be related.

→ Complete #1-4 in the Hands On 3 Questions document (if working together, each person should write their own answers, although you may discuss)

3. Next, you will **write your own questions to measure the college experience variable you chose**. (For the personality variable, you will use an existing scale called the Big 5 Inventory, so you don't need to write personality questions.)

Write a scale with at least **5 items** to measure your college experience variable (maximum of 10 items). All items should be **close-ended**. Strive for **content validity** as you write your questions (review lecture 6 if you need a refresher on this). Additionally, make sure to use the guidelines regarding writing valid questions from the last lecture (avoid double-barreled questions, negative wording, loaded/leading questions, and technical or vague wording).

Additionally, decide on your rating scale. It can be either unipolar or bipolar. All items should use the same rating scale.

→ If you are working together, discuss how you want to measure your college experience variable. Discuss what to ask about, the specific item wording, and the response scale. Do not split up the items and have one person write some and the other person write others – instead, create the items together.

→ Complete #5-6 in the Hands On 3 Questions document (if working together, it is okay if you use the same item wording, as long as you came up with it together – but you will each make your own survey in Qualtrics)

Part II: Create your survey questions in Qualtrics

4. First, you will need to activate your Qualtrics account. Barnard and Columbia both have institutional subscriptions to Qualtrics, meaning that students get access for free!

Barnard students: Go to <https://barnard.az1.qualtrics.com/> and use your Barnard username and password to log in.

Columbia students: Go to <https://cumc.qualtrics.com/> and use your Columbia UNI and password to log in.

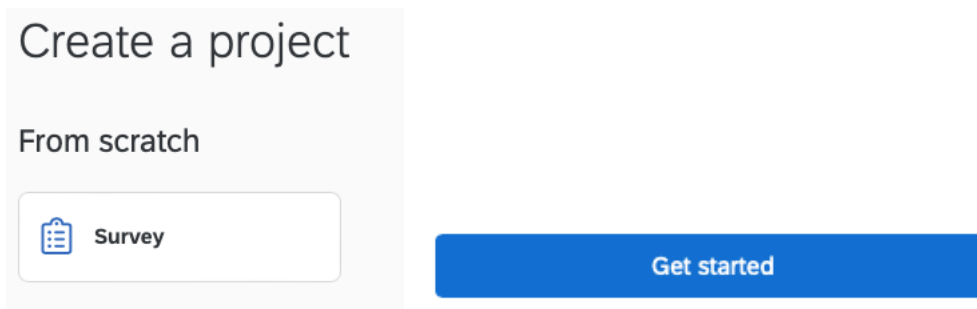
If this is the first time you have activated your Qualtrics account, you should see an empty dashboard.

5. Click on the blue “Create a new project” button in the lower left-hand corner.



Create a new project

6. Click on “Survey” under the “From scratch” heading, and then “Get started.”

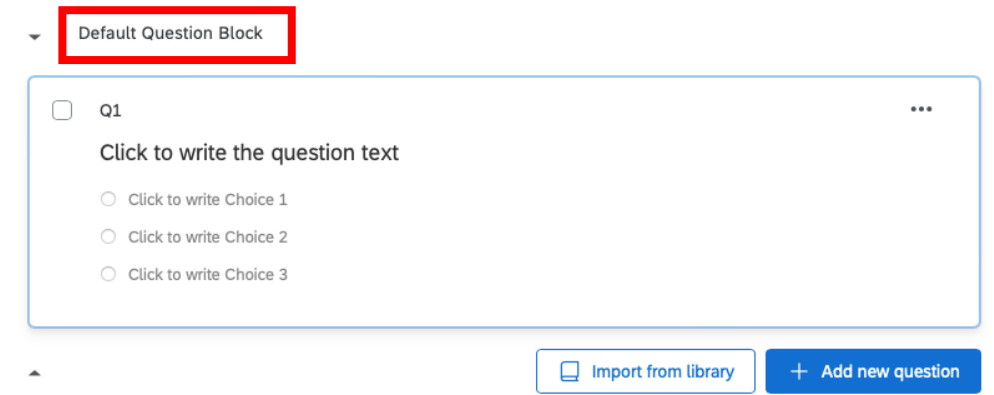


7. Name your survey and make sure that “Create a blank survey project” is selected. Then click “Create Project.”

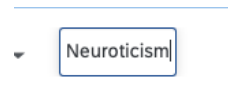
A screenshot of the 'Create a new project' form. The title is 'Create a new project'. Below it is a label 'Survey'. The 'Name' field contains the text 'Methods Hands On 3'. Below that is a dropdown menu labeled 'How do you want to start your survey?' with the option 'Create a blank survey project' selected. At the bottom are two buttons: 'Create project' (blue) and 'Cancel' (blue text).

8. If you have never used Qualtrics before and it offers you a “tour” in a welcome pop-up window, it may be helpful to click “Take a tour” to get a brief intro to the Qualtrics platform.
9. Now you are ready to start creating your survey. First, you will enter the items corresponding to the personality dimension you chose. These items will come from the Big Five Inventory (BFI; John & Srivastava, 1999), which is included at the end of this document. The BFI contains 44 items, with 8-10 items per personality dimension.

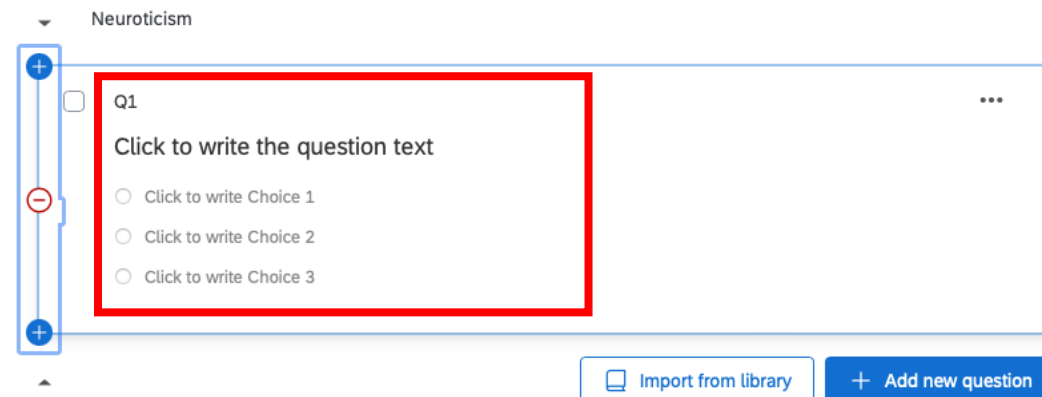
First, name your question block in Qualtrics. “Question block” just means one part of your survey—a collection of questions on the same topic. Click on where it says “Default Question Block” as shown below:



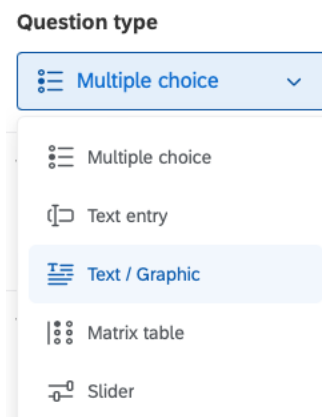
This should bring up a cursor that allows you to change the name of the block. Type in the name of the personality dimension you chose. For example:



- Next, you will enter the instructions for the scale. In Qualtrics, click on the sample question (where it says “Q1 Click to write the question text”):



Next, click on where it says “Multiple choice” under the heading “Question type” in the left panel. This will bring up a dropdown menu of question types. Select “Text / Graphic.”



Now click where it says “Click to write the question text” and type in the BFI instructions that appear above the rating scale. Note that because this scale is being administered online, the instructions that say “Please write a number next to each statement to indicate...” must be edited – you can write “Please select a response to indicate...”

Click outside of the question box to close the question text editor. Lastly, click on where it says “Q1” and name this question “BFI Instructions.”

- Next, add a new question by clicking the blue “+ Add new question” button. Select “Matrix table” from the dropdown menu.

- Click on where it says “Click to write the question text” and type in “I see myself as someone who...” to complete the instructions from the BFI scale.

Q2

Click to write the question text

	Click to write Scale Point 1	Click to write Scale Point 2	Click to write Scale Point 3
Click to write Statement 1	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Click to write Statement 2	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Click to write Statement 3	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Rich Content Editor... Piped Text...

I see myself as someone who...

Edit Question Label

Additionally, name the question in the same way as you did before by clicking on “Q2” and typing in the name of the scale:

BFI Neuroticism

I see myself as someone who...

- Next, enter in the response scale. By default, the matrix question type has 3 scale points (“Click to write Scale Point 1/2/3”). The BFI has 5 scale points (Disagree strongly, Disagree a little, Neither agree nor disagree, Agree a little, Agree strongly) so you need to add two more.

On the left panel under “Scale points,” click the “+” button twice to change the number of scale points from 3 to 5.

▼ Scale points

Number of scale points

– 3 +

Now, click on each scale point and type in the scale point text from the BFI.

Disagree strongly Disagree a little Neither agree nor disagree

Click to write Scale Point 4 Click to write Scale Point 5

- Next, you will enter in the items corresponding to the personality dimension you chose (*only* the ones for that personality dimension, not all 44 items!). Each dimension of the BFI has 8-10 items.

Go to the second page of the BFI where it says “Scoring.” This tells you which items go with which personality dimension (you can ignore the Rs for now—we will learn more about what those mean in Hands On 4). For example, since I selected neuroticism, I will enter items 4, 9, 14, 19, 24, 29, 34, and 39 into my survey.

First, count the number of items that correspond to your personality dimension and use the “+” button under “Statements” to add as many items as you need. For example, the neuroticism dimension includes 8 items, so I will click the “+” button until there are 8 statements.

▼ Statements

Number of statements

– 8 +

Next, click on each statement in the matrix table and enter in the items for your personality dimension.

BFI Neuroticism

I see myself as someone who...

	Disagree strongly	Disagree a little
is depressed, blue	<input type="radio"/>	<input type="radio"/>
is relaxed, handles stress well	<input type="radio"/>	<input type="radio"/>
can be tense	<input type="radio"/>	<input type="radio"/>
worries a lot	<input type="radio"/>	<input type="radio"/>
is emotionally stable, not easily upset	<input type="radio"/>	<input type="radio"/>
Click to write Statement 6	<input type="radio"/>	<input type="radio"/>
Click to write Statement 7	<input type="radio"/>	<input type="radio"/>
Click to write Statement 8	<input type="radio"/>	<input type="radio"/>

15. Proofread what you have entered so far to make sure that you have entered the correct items, the instruction and item text matches the BFI, any typos have been fixed, and the question block and both questions have been named.

16. Next, you will enter the questions that you wrote. First, click on “Add Block” under the BFI question block.

is emotionally stable, not easily upset	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
can be moody	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
remains calm in tense situations	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
gets nervous easily	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

INPEV

Name the block by clicking on “Block 1.” Choose a name that makes sense for your college experience variable.



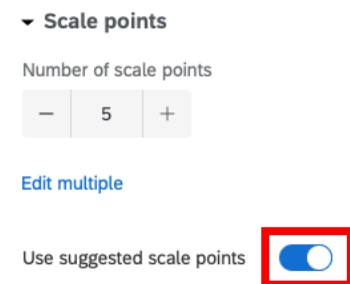
Click “+ Add new question” and select the question type that goes with your response scale. In most cases, this will probably be the “Matrix table” question format as above, but if you chose to use sliders, for example, you would select “Slider.”

If you select the wrong question type and want to change it, you can always click on the question and use the dropdown menu on the left under “Question type” to change the type.

Use the “number of statements” and “number scale points” (if using Matrix table) options on the left to make sure you have the right number of statements and scale points.

Then, enter in your items and scale point text from the Hands On 3 Questions document.

Sometimes Qualtrics tries to be helpful by suggesting scale point text (and then resists you trying to change the number of scale points). If this happens, you can turn that off by toggling off “Use suggested scale points” on the left under “Scale points.”



(Alternatively, you can browse through Qualtrics’s saved scale point text by clicking the dropdown menu under “Use suggested scale points” – if you want to use one of Qualtrics’s suggestions, feel free, as long as it is appropriate for your scale. In that case, be sure to change the rating scale text accordingly in #6 in your Hands On 3 Questions document.)

Don’t forget to name your scale by clicking “Q3” and typing in an appropriate name for the scale.

Additionally, add in a short instruction for your scale by clicking “Click to write the question text.” For example, instruction text for a Matrix table question might be “Please select a response to indicate how much you agree or disagree with each

statement” or “Over the last [period of time], how often have you experienced the following?” Instruction text for slider questions might be “Please move the slider to indicate... [whatever they are indicating].”

Here is the example matrix table for my college experience variable of worry about getting a job after college.

▼ Worry about post-college jobs ...

Job worry

Over the **last 2 months**, how often have you experienced the following issues?

	Not at all	Several days	More than half the days	Nearly every day
Feeling anxious about getting a job after college	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Feeling stressed about what I will do after college	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Trouble falling asleep due to uncertainty about my future after college	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Trouble concentrating on things, such as reading, working, or watching television, due to worrying about my future career prospects	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Feeling nervous about whether anyone will hire me after college	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

▲

Import from library + Add new question

If you want to include some bold or formatted text like the above example, click in the text and select “Rich Content Editor...” This brings up a formatting window where you can change the font, change the size, or add bold, italics, or underline.

Rich Content Editor... Piped Text... Remove Formatting

HTML View Normal View

Over the **last 2 months**, how often have you experienced the following

Edit Question Label

17. Proofread your scale to make sure that your items and response scale are written as you had planned, any typos have been fixed, and the question block and question(s) have been named.

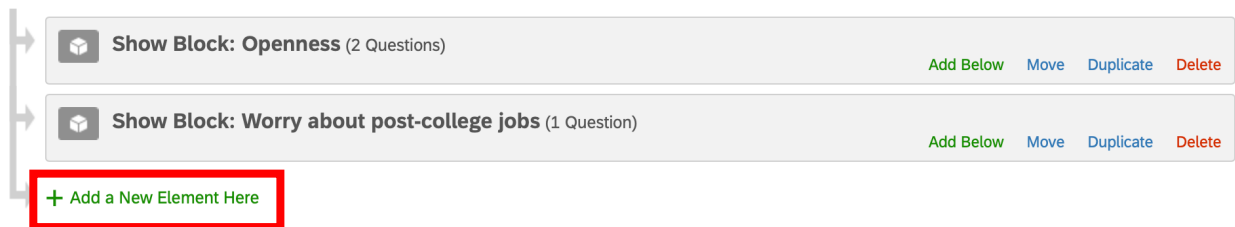
Part III: Finalizing your survey in Qualtrics

18. Once your two question blocks – the personality block and the college experience block – are complete, the last step is to **counterbalance the two blocks**. Counterbalancing means that the blocks will be shown to participants in a random order. This prevents item-order effects from affecting survey results.

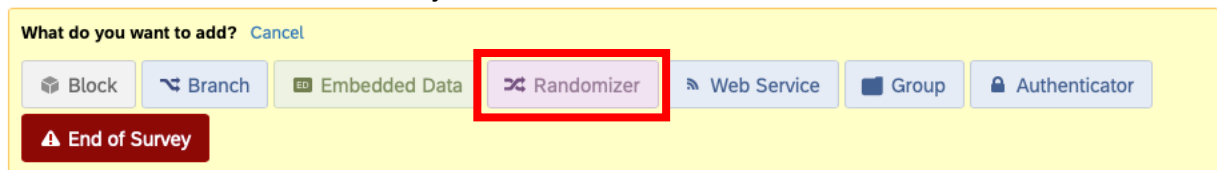
All the way on the left, click on the second icon from the top:



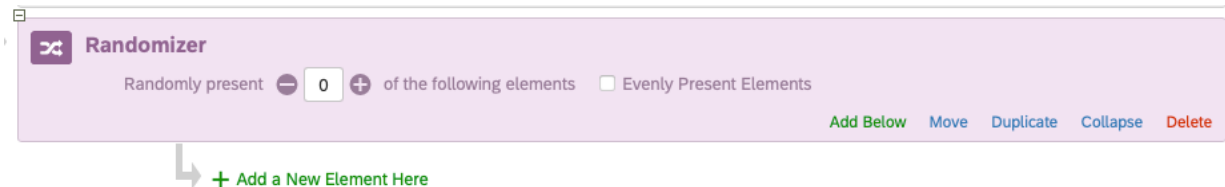
This will bring you to the Survey flow page. Click the green “+ Add a New Element Here” text.



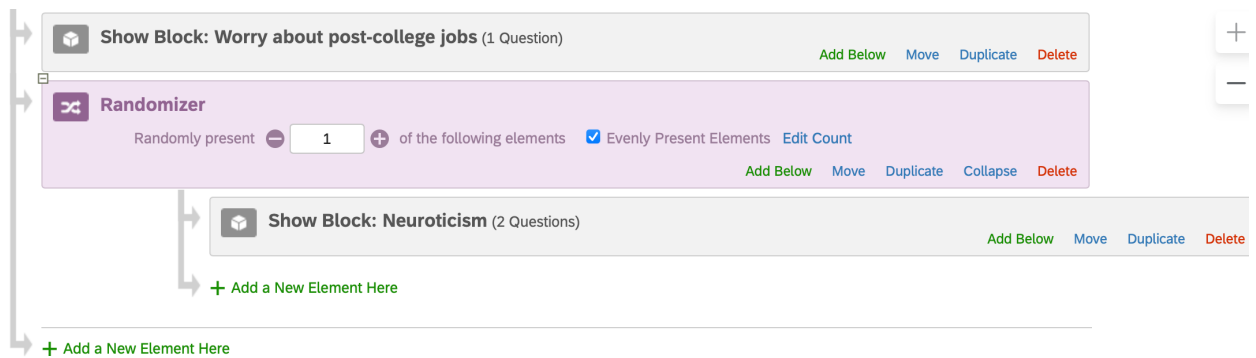
Select “Randomizer” from the yellow box.



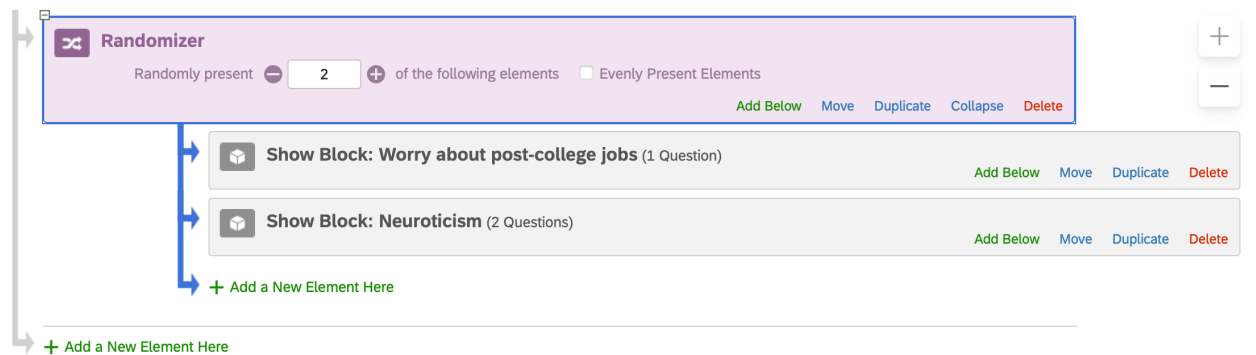
It should look like this:



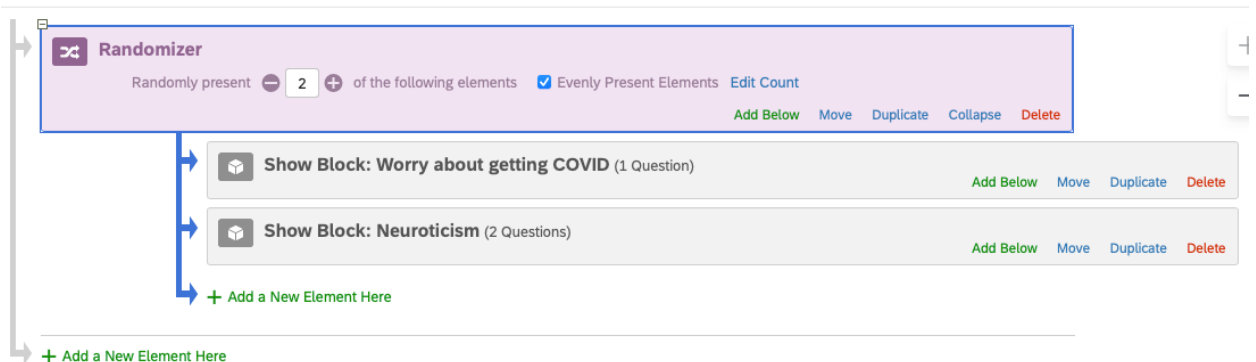
Next, click and hold the blue “Move” text on your personality block and drag it on top of the Randomizer. The Randomizer should turn green. Let go and your personality block will move into the Randomizer.



Do the same for your college experience block. Now both of your question blocks should be inside the Randomizer:



Next, make sure that the number inside the Randomizer is “2” – it should say “Randomly present 2 of the following elements.” Additionally, check the box for “Evenly Present Elements.” That will make sure that 50% of participants get the personality questions first and 50% of participants will get the college experience questions first (if you were actually administering the survey).



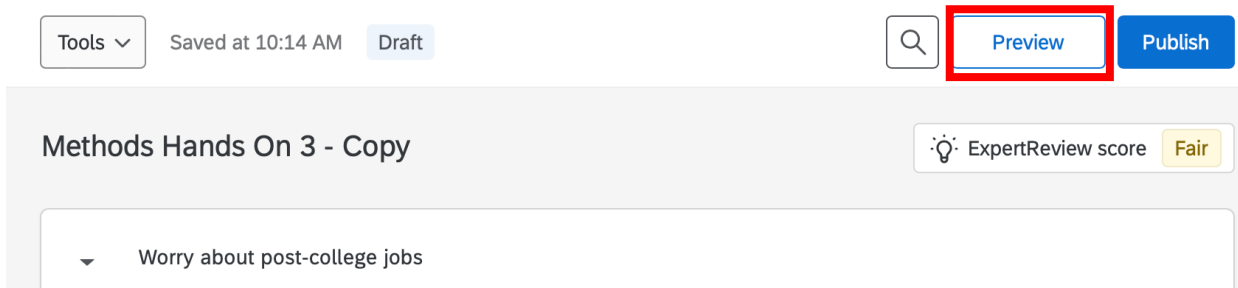
At the bottom of the Survey flow page, click “Apply.”



19. Go back to the survey by clicking the Survey icon all the way on the left.

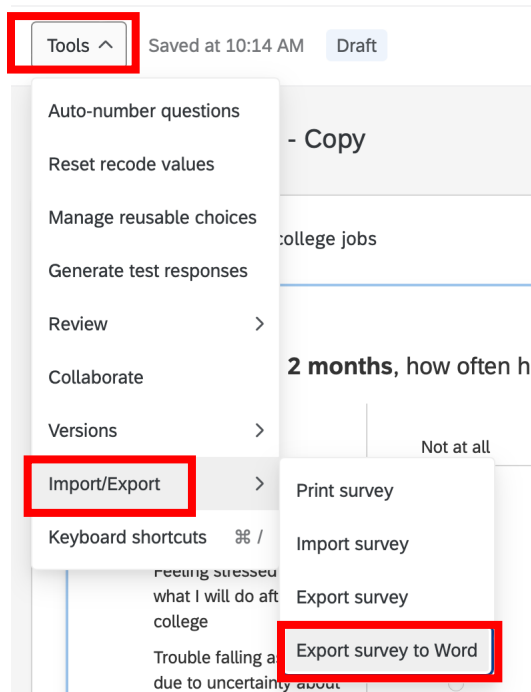


20. At the top of your survey, select the “Preview” button. This brings up a preview of your survey. Try taking your survey and fix any additional typos or formatting issues you find. If you press Preview a few times, you should see your counterbalancing in action: Sometimes you’ll get your personality questions first, and sometimes you’ll get your college experience questions first.



Part IV: Export your survey

21. At the top of your survey, select the “Tools” dropdown menu. Select “Import/Export” and then “Export Survey to Word.” (Note that you do not have to have Word for this to work.)



22. In the pop-up box, make sure that the following options are selected. Most are selected by default, but be sure to select “Show Survey Flow.” Then click “Export.” (If you want a sample of what it should look like, see the “Hands On 3 – Survey Sample” on Courseworks.)

Export Survey to Word

When exporting your survey to Word, question presentation may be different and may not reflect all formatting customizations.

- ☒ Show Question Numbers
- ☒ Show Logic
 - ☐ Use Question Numbers
 - ☐ Use Recode Values
- ☒ Show Coded Values
- ☒ Strip HTML Tags from all Questions and Answers
- ☒ Condense Dropdown Choices
- ☒ Show Survey Flow
- ☐ Include Graphic
 - ☒ Use Brand's Default Logo
 - ☐ Select from Library (Nothing Selected)

Cancel

Export

23. Upload this Word document and the Hands On 3 Question document to Courseworks. You are done!

...but you are encouraged to play around more in Qualtrics to check out its other features! This was just a small sample of what Qualtrics can do. Their support resources are also quite good if you want to poke around:

<https://www.qualtrics.com/support/survey-platform/survey-module/survey-module-overview/>

Descriptions of Big 5 Personality Dimensions

Extraversion

The extent to which one tends to be sociable, outgoing, active, and assertive.

Can include the following different components:

- Talkative
- Outgoing
- Gregarious (sociable)
- Energetic
- Assertive
- Active
- Excitement-seeking
- Dominant
- Outspoken
- Enthusiastic

Agreeableness

The extent to which one tends to be compassionate, cooperative, warm, and caring to others, and put others' interests above one's own.

Can include the following different components:

- Sympathetic
- Kind
- Appreciative
- Affectionate
- Soft-hearted
- Warm
- Trusting
- Altruistic
- Compliant
- Generous

Conscientiousness

The extent to which one tends to be careful, organized, hardworking, and rule-following.

Can include the following different components:

- Organized
- Thorough
- Efficient
- Competent
- Orderly
- Dutiful
- Self-disciplined
- Deliberate
- Responsible
- Reliable

Neuroticism

The extent to which one tends to be interpersonally sensitive and experience negative emotions like anxiety, fear, sadness, and anger.

Can include the following different components:

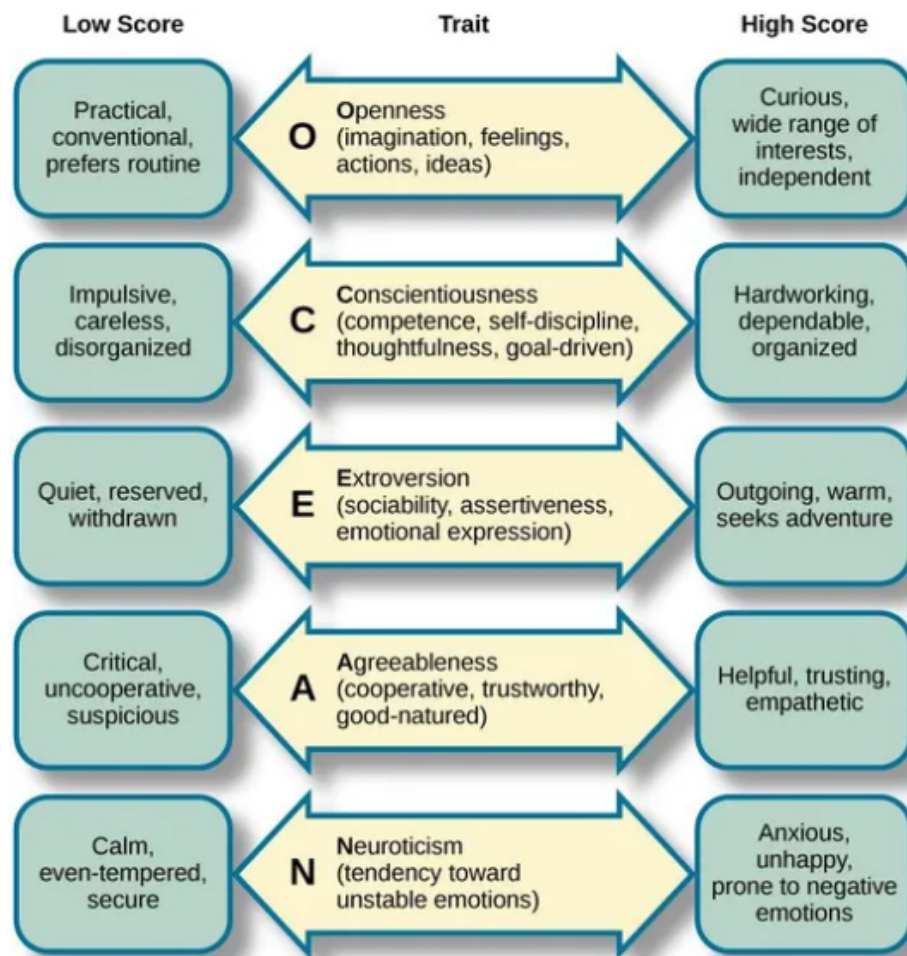
- Tense
- Anxious
- Nervous
- Angry
- Depressed
- Moody
- Self-conscious
- Impulsive
- Vulnerable
- Worrying

Openness to Experience

The extent to which one tends to seek out and to appreciate new things, including thoughts, feelings, values, and experiences.

Can include the following different components:

- Wide interests
- Imaginative
- Original
- Curious
- Fantasy prone
- Insightful
- Open to feelings
- Open to diverse behaviors
- Open to new and different ideas
- Open to various values/beliefs



For more information:

Diener, E. & Lucas, R. E. (2022). Personality traits. In R. Biswas-Diener & E. Diener (Eds), *Noba textbook series: Psychology*. Champaign, IL: DEF publishers. <http://noba.to/96u8ecgw>

John, O. P., & Srivastava, S. (1999). The Big-Five trait taxonomy: History, measurement, and theoretical perspectives. In L. A. Pervin & O. P. John (Eds.), *Handbook of personality: Theory and research* (Vol. 2, pp. 102–138). New York: Guilford Press.

Scale:

The Big Five Inventory (BFI)

Here are a number of characteristics that may or may not apply to you. For example, do you agree that you are someone who likes to spend time with others? Please write a number next to each statement to indicate the extent to which you agree or disagree with that statement.

Disagree
strongly
1

Disagree
a little
2

Neither agree
nor disagree
3

Agree
a little
4

Agree
Strongly
5

I see Myself as Someone Who...

- | | |
|--|--|
| ___ 1. Is talkative | ___ 23. Tends to be lazy |
| ___ 2. Tends to find fault with others | ___ 24. Is emotionally stable, not easily upset |
| ___ 3. Does a thorough job | ___ 25. Is inventive |
| ___ 4. Is depressed, blue | ___ 26. Has an assertive personality |
| ___ 5. Is original, comes up with new ideas | ___ 27. Can be cold and aloof |
| ___ 6. Is reserved | ___ 28. Perseveres until the task is finished |
| ___ 7. Is helpful and unselfish with others | ___ 29. Can be moody |
| ___ 8. Can be somewhat careless | ___ 30. Values artistic, aesthetic experiences |
| ___ 9. Is relaxed, handles stress well | ___ 31. Is sometimes shy, inhibited |
| ___ 10. Is curious about many different things | ___ 32. Is considerate and kind to almost everyone |
| ___ 11. Is full of energy | ___ 33. Does things efficiently |
| ___ 12. Starts quarrels with others | ___ 34. Remains calm in tense situations |
| ___ 13. Is a reliable worker | ___ 35. Prefers work that is routine |
| ___ 14. Can be tense | ___ 36. Is outgoing, sociable |
| ___ 15. Is ingenious, a deep thinker | ___ 37. Is sometimes rude to others |
| ___ 16. Generates a lot of enthusiasm | ___ 38. Makes plans and follows through with them |
| ___ 17. Has a forgiving nature | ___ 39. Gets nervous easily |
| ___ 18. Tends to be disorganized | ___ 40. Likes to reflect, play with ideas |
| ___ 19. Worries a lot | ___ 41. Has few artistic interests |



____20. Has an active imagination

____21. Tends to be quiet

____22. Is generally trusting

____42. Likes to cooperate with others

____43. Is easily distracted

____44. Is sophisticated in art, music, or
literature

Scoring:

BFI scale scoring (“R” denotes reverse-scored items):

Extraversion: 1, 6R, 11, 16, 21R, 26, 31R, 36

Agreeableness: 2R, 7, 12R, 17, 22, 27R, 32, 37R, 42

Conscientiousness: 3, 8R, 13, 18R, 23R, 28, 33, 38, 43R

Neuroticism: 4, 9R, 14, 19, 24R, 29, 34R, 39

Openness: 5, 10, 15, 20, 25, 30, 35R, 40, 41R, 44

