**Exploratory Draft Survey Design Template**

Surveys that meet to certain criteria outlined by the **Tailored Design Method** (TDM) typically illicit better response sets and rates than those written without a framework by via some other construction method. What is described below serves as a starting point for any survey that may be longer or even shorter. While it may be obvious, to make a survey longer we can simply add items as needed. However, making a survey shorter is far more complex and involves a process known as *reducing and collapsing*. If you have taken any qualitative research courses, the process borrows from those concepts and is mixed with a quantitative method known as ranked voting[[1]](#footnote-1).

**The Structure (Which May Not Make Much Sense Right Now)**

Most survey drafts are built on a 10-item framework with eight (8) quantitative and (2) qualitative questions in that order yielding structure that is split into 80% and 20%. We’ll cover this in greater detail later when we in the analysis portion of the course, but in general it loosely related to a rule of thumb called the **Pareto principal,** but the connection to the 80/20 split is related more about aligning with certain statistical models and less having to do with a survey satisfying a static makeup consisting of 80% quantitative and 20% qualitative questions.

If that is confusing, just take my word for it at the time being. It will hopefully become clear later on as we progress and you learn to build valid and

**Formatting**

Depending on who you ask, either the term **blocks** [[2]](#footnote-2)or **chunks**[[3]](#footnote-3) are typically used to describe sections of a survey with items that are assessing the same idea, known formally as a **construct**. These can be generalized ideas like those provided below in **red** or they can be particularized within individual surveys where you have an opportunity to break up questions into homogeneous units – aka items that can be grouped together to assess a single **criterion** which we will cover soon, but not today.

In general, a typical survey should follow the basic framework outlined below which consists of a greeting, the survey itself, and a thank you. Within each chunk is a list of criteria that should be satisfied in order for that chunk to work correctly.

1. **Welcome page** (also called the **Landing page**) is the first item a respondent sees. It should be *written in present tense* satisfying at minimum the following elements[[4]](#footnote-4):
   1. gratitude for participating
   2. a description of the reason for the survey
   3. a summarization of what you intend to do with the results
   4. if the responses will be anonymous or not
   5. how you will protect responses
   6. estimated length of time that the survey will take
   7. if any penalty will be administered for not participating,
   8. how to logistically proceed with the survey
2. **Main Body** (also called the **List of Items**) is a logical itemized list of survey questions following the 80/20 split. Again, and I can’t stress this enough, please do not consider this proportion as a hard and fast rule. Your final survey should be informed by other factors, none of which depend on statistical modeling.
   1. Framework: Items are generally ordered from simple to complex. Complexity is not determined by a single metric and is often derived from multiple indicators (e.g. the intricacy of a question, the weight that’s assigned to responses, gaining a representative sample, etc.)
   2. Structure: Items are initially broken into the initial split with
      1. eight (8) closed ended questions, and
      2. two (2) open ended questions[[5]](#footnote-5) where the very last item reserved for assessing any information not covered within the body.
3. **Gratitude page** (also called the **Exit page**) is the last item a respondent sees before submission. It should be *written in past tense* with elements from the welcome page and two additional items
   1. The first noting that respondents may go back and change their answers and simple directions on how to go back;
   2. The second with directions on how to submit or end the survey.

[A close up of a sign

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1. We won’t have the bandwidth to cover this process in great detail, but if your final survey necessitates a   
    count of items less than ten, I’ll be happy to work with you in an individual basis. [↑](#footnote-ref-1)
2. Both Mathematicians and Qualtrics uses this term but that’s where the similarities end. [↑](#footnote-ref-2)
3. Used in computer and data science [↑](#footnote-ref-3)
4. This is a typical order but by no means mandated. Use your own judgement in deciding what should   
    appear where. [↑](#footnote-ref-4)
5. So really one open ended questions since ethe other is already defined. [↑](#footnote-ref-5)