Template for a Survey Protocol

1. **Change Record**
    This should be a list or table summarizing the main updates and changes embodied in each version of the protocol and (where appropriate), the reasons for these.

2. **Background**
    a) identify previous research on the topic
    b) define the main research question being addressed by this study and any hypotheses (for an experimental survey)
    c) identify any additional research questions/hypotheses that will be addressed

3. **Design**
    a) determine the form of survey (experimental or descriptive, or both)
    b) identify the data requirements arising from the research question(s) including both directly topic related and indirectly topic related issues
    c) identify the population to be studied (e.g. practitioners, students, novices,…)
    d) describe how the participants will be selected (recruited)
    e) select the sampling technique
    f) specify the sample size required
    g) determine how the data is to be collected (paper, web, interview, literature, observation)

4. **Data Preparation and Collection**
    a) describe how the survey instrument will be prepared , how a balance of open and closed forms will be used, and how related questions will be grouped
    b) define a data collection plan (how will responses be coded)
    c) define how the data will be stored
    d) identify any follow-up mechanisms for ensuring that the response rate is adequate

5. **Analysis**
    a) the plan should identify which data elements are used to address which research question and how the data elements will be combined to answer the question
    b) describe any statistical forms or graphical forms to be used
    c) assess the threats to validity (construct, internal, external)

6. **Reporting**
    Identify target audience, ways of providing data (e.g. pie charts, tables,…)

7. **Schedule**
    Give time estimates for all of the major steps