charities evaluation services

Writing better questionnaires getting better data

Writing better questionnaires: getting better data

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Charities Evaluation Services

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Introduction

What is this guide about?

More and more organisations are self-evaluating the work that they do, with a greater emphasis on assessing their outcomes and impact. This means collecting data. One of the most commonly-used data collection methods is the questionnaire, but organisations don't always put in enough time and resources to get useful and valid evidence from them. It takes clear thinking and considerable practice to get it right.

This guide is developed particularly for voluntary and community organisations. It is a practical resource on ways to plan and design a questionnaire, and on how to write good questions and get a response rate that will give you credible data. It specifically has in mind how to get information about how users value your services, and about the outcomes and impact that your services achieve.

Charities Evaluation Services (CES) has a number of other publications that you may find helpful when designing and carrying out your data collection. You can freely download the following from the CES website.

- Information Collection Methods: Choosing tools for assessing impact (2013)
- The CES Resource Guide: Evaluating outcomes and impact, 2nd edition (2013)
- Assessing Change: Developing and using outcomes monitoring tools (2010)

How to use this guide

You can choose to dip into the guide to find specific information or you can work through it methodically. Following this introduction, the guide is divided into six main sections:

- Planning your questionnaire
- Drafting the questions
- Putting the questionnaire together
- Designing the questionnaire
- Administering the questionnaire
- Using the data from questionnaires.

Using questionnaires

Questionnaires are a relatively cheap and quick way to gather information from a large number of people on a limited number of topics. The same questions are asked to each individual; responses are summarised as statistics and can be easily compared. Online questionnaires provide statistical analysis for you.

Your respondents may come from:

- your target group – those you would like to use your services
- your user group – those who actually use your services
- potential users – those in your target group who know about your services
- non-users – those in your target group who know about your services but choose not to use them
- other stakeholders
- other professionals.

Voluntary sector organisations are increasingly using online questionnaires as a way of reaching their target population efficiently to find out about user needs or stakeholder satisfaction (staff, users or other stakeholders). More and more, online questionnaires are also being sent to users and other stakeholders as part of an assessment of the difference organisations make – their outcomes for users and their broader impact.

For web-based surveys, participants access the questionnaire through clicking on a hyperlink sent in an email message or by typing the web address into their browser. However, an online questionnaire won't be suitable for all situations, and for small numbers of respondents, a questionnaire based in an email, or attached to it, may be more appropriate. Paper-based questionnaires remain useful to distribute in group situations, or to people who may not have access to the internet. However, care must also be taken to consider how access to these questionnaires might also exclude certain groups and evidence.

Whether questionnaires are online or paper-based, whether they are short and snappy or long and detailed, drafting and designing your questionnaires well is key to getting good information. Even when questionnaires are administered by phone or face to face, well-drafted questions are important.

There are some problems associated with questionnaires: not enough people returning information (low response rate); an introduction of bias to the results caused by the choice of sample or low response rates; the extent to which the validity of data is compromised if questions are not designed well or people understand the questions differently. Good questions and good questionnaire design are important to limit these potential difficulties.

Defining the terms

It will be useful to be clear about what we mean by some of the main terms used in this guide. The terms 'survey' and 'questionnaire' are often used interchangeably, although one is more general and the other more specific.

Survey

A survey is a process of systematically collecting information from different individuals. Surveys are carried out for many different purposes and can be done in a number of different ways, including through questionnaires and interviews. Whatever method is used, a survey will use standardised procedures and a structured format, so that every participant is asked questions in the same way, and responses can be statistically and thematically analysed. Participants being surveyed may present their own views or represent those of an organisation to which they belong or are attached.

Questionnaire

A questionnaire is a research tool – a specific type of information gathering which may be used in surveys to collect information from different individuals. Questionnaires are paper-based or electronic forms that have a series of simple or complex questions for individuals to complete on their own, or with some assistance if necessary or appropriate.

Population

We refer to a 'population', meaning the whole group that the sample of individuals or organisations you choose (ultimately your respondents) represent. For example, if you send a questionnaire to a sample of the users of a helpline over a specific time period, the 'population' would refer to all the users of the helpline. If you distribute a questionnaire at the end of a series of training workshops, the population would be all those participating in the training, not the 80 per cent that completed your questionnaire.

Sample

You may be able to reach all of a specific audience, for example, your service users or other professionals you are in touch with. But if large numbers are involved, you may decide to select a sample as a more practical and efficient approach. A sample is the selection of individuals (or organisations) from the target population to whom you will direct your survey, though not necessarily the group that actually completes the research. There will be individuals who are unreachable as well as non-respondents, but a good sample is one that is representative of the population from which it is drawn.

How you decide to sample will be influenced by:

- whether you are doing quantitative or qualitative research, or both
- what resources you have available
- what other methods of research you are using.

There are two main types of survey samples:

Probability samples. These allow you to use the findings from your sample to draw conclusions about the total population. Organisations sampling from their total user population may use different types of sampling:

- Simple random sample – each individual is chosen randomly and completely by chance. This means that each individual is as likely to be selected to be part of the sample. This sampling should provide unbiased sampling, but it requires the whole of your population (for example, all your users calling a helpline, or all organisations downloading your resources) to serve as the sampling frame from which you make your random selection. This option may not be available or feasible.
- Systematic random sample – you start by choosing one from your list randomly and then select at regular intervals, for example, the fourth name on your register, or every tenth organisation in your database. This sampling technique isn't well suited when the population is diverse in any way, as this diversity may not be well represented.
- Stratified sample – used when groups within a population vary. You divide members of the population into subsets, with every individual assigned to one group only. You can then randomly select within each group. This will help you make sure that all types of people or organisations you work with are represented, although note that you need to have large enough numbers in each group for the information to tell you something about that group's particular views or experiences.

You could also have a probability sample by issuing pop-up invitations to your website users randomly, or by surveying every nth visitor to the website.

Non-probability samples. If you don't have access to all the population that you want to represent, you may not be able to use random selection procedures. Even with a random selection, you won't be able to draw firm conclusions about the entire population based on the sample data, and it will be important to describe the characteristics of your respondents (for example, geographical spread, age, gender and other relevant characteristics) so that it's clear where there may be possible sample bias (see explanation of 'bias' below).

Non-probability samples include:

- Convenience sampling – this allows people to self-select as to whether they respond, for example, to a questionnaire posted on a website. People answering questionnaires are likely to have a particular interest in a topic, whether positive or negative.

- Volunteer opt-in panel – where a sample is created by recruiting a panel of volunteers.This is used for online surveys, for example, by using pop-up advertisements.
- Purposive sampling – in this, you select your participants with a purpose in mind. You may want to focus on particular groups, based on demographic data, geographical area, or their participation in activities. You may want to ensure that you reach groups and individuals who have a different experience of your services or to give particular weight to specific groups or perspectives.
- Snowball sampling – this is achieved when individuals or organisations are identified who can refer your survey on to others.

Sampling frame

A sampling frame is a list of the individuals from whom you are going to obtain information. Sampling frames can include email distribution lists, members of an organisation, or a database of service users. A sampling frame may also divide this overall list according to a number of different criteria to ensure that you get a representation of individuals or organisations with a diversity of characteristics that you want to know about. Your sample will be drawn from this list.

Survey bias

Survey bias may occur when findings are unduly influenced by the way the data is collected, analysed or interpreted. Bias can occur in a number of ways:

- Sample bias – this happens when the sample is selected in a way that makes it less likely for some members of the target population to be included than others.
- Coverage bias – this happens when the survey is unable to reach portions of the given population. For example, for online surveys this may happen if people are not able to access the internet; this may particularly affect a specific group of people, for example, older people.
- Response bias – this happens because of the difference between those people included in the sample who choose to respond to the survey and those who do not. As well as issues of difference in access, those responding are likely to have strong positive or negative views. Bias may also be introduced because people tend towards giving a response that is seen as socially acceptable, and under-report behaviour that is regarded as negative. Numbers or frequency related to sensitive topics may be inflated or underestimated.

Response rate

The response rate is the percentage of people invited to participate in the survey who respond. Efforts should be made to encourage a high response rate so that you have accurate, useful results which are representative of the target population.

Planning your questionnaire

First steps

When you start planning your questionnaire, you will have some idea of its broad purpose. Before you go further – to define more specific aims and objectives – you should consider:

- the budget and other resources you have available
- your likely timeline from setting the research objectives and agreeing them through the design phase, the administration of the questionnaire, its analysis, and writing your report and disseminating the findings.

Thinking about this at the beginning will allow you to set realistic parameters for your survey, and affect your decisions about what you want to cover in the questionnaire. With this in mind, define your aims and objectives more clearly. It could be that you need to increase the resources that you were going to allocate to the task.

Knowing your purpose

It is important that you are clear about the purpose of your questionnaire from the outset; you should consider this before you think about how you are going to administer it. For example, a questionnaire could be intended to 'assess the need for our services' or to 'find out what difference we have made to our user group'. Once you have expressed your purpose broadly, it could be that you start to make your aim more meaningful and more specific.

If you were putting out a questionnaire after a conference, you might originally consider your aim to be: '*To get feedback on how well the conference went*'. However, you can clarify this in a way that will lead you to be more specific. You may find that you have three main purposes:

'*To assess how satisfied participants were with conference arrangements, how far the conference met with their aims and what benefits they gained.*'

At this stage, and before you start drafting the questions, it's also important to clarify your objectives. These will break down the issues you need to address in order to meet the purpose of the questionnaire and should provide a framework for your questions. List these, as in the box below:

The post-conference questionnaire

Overall purpose: To assess how satisfied participants were with conference arrangements, how far the conference met with their aims and what benefits they gained.

Questionnaire objectives: To collect information from participants about:

- who the participants were
- how they have used our resources in the past
- what their aims were in attending the conference and if they were met
- what elements of the conference programme worked well
- what they learned from the conference
- whether they made new contacts
- what plans they have as a result of the conference programme.

A questionnaire can provide an opportunity to cover a number of things, but it's important to prioritise. Think carefully about whether it's realistic to get a proper assessment or measurement of each element of interest.

Thinking about how you will analyse in advance

It is important to think about whether you will report your data descriptively, or whether you will want to draw conclusions for the general population based on your data. Inferential statistics allow you to find out if your results are 'statistically significant' or not (that the results have not just happened by chance) and whether your findings can be generalised to the whole population. Your questions, your measurement scales and your sample type and size will all be of consideration if you are going to use statistical inference effectively. For example, your sample size should be about 10 per cent of the total population, but not smaller than 30 – and care will be needed if you are analysing your data by subgroup, such as by age, ethnicity or size of organisation.

You may want to consult with someone who is familiar with statistical analysis in advance. However, this sort of analysis may not be feasible or even appropriate for your information needs.

An overview of the process

Producing a questionnaire involves a process that starts with being clear about why you are doing it and what you want to know, and ends with analysing the data, producing findings and getting these out to people who need to know the information. This guide does not discuss managing, analysing and interpreting the data, but it's important to bear in mind issues concerning analysis and how you will present the data when you are drafting and designing the questionnaire.

On the next page you will find a chart outlining the steps involved in producing a questionnaire.

Questionnaires – the process

The process involves the following steps:

1. Clarify your purpose

- What do you want to know?
- Why do you want to know it?
- Who is the information for?
- Who else will be interested?
- What do they want to know?

2. Define who you want information from

- What is your target population?
- Do you have a sampling frame, or can you create one?
- How important is it to have a statistically representative sample?

3. Plan your data collection

- What is your budget?
- What is your time frame?
- What are your people resources?
- How will you administer the questionnaire?

4. Develop the questionnaire

- Draft the questions.
- Consult with others and redraft.
- Design the questionnaire.
- Pilot the questionnaire and amend.

5. Collect data

- Send an advance invitation wherever possible.
- Administer the questionnaire.
- Monitor responses.
- Follow up non-responses when needed.

6. Manage the data

- Create a coding scheme.
- Input the data or export from an online questionnaire.
- Check the data for errors and inconsistencies.

7. Analyse the data and report findings

- Describe the distribution and frequency of responses.
- Carry out any comparison of subsets.
- Identify trends and relationships between variables.
- Check for any potential bias.
- Use a reporting method best suited for your target audience.
- Make the findings available to respondents wherever possible.

Adapted from: Sue, VM and Ritter, LA (2007) *Conducting Online Surveys*, SAGE, page 2.

Drafting the questions

Overview of the drafting process

Before you consider the overall design and presentation of the questionnaire, you should create a first draft of the questions you want to cover.

Follow these main stages when drafting your questions:

- List what you want to cover, including any questions relating to outcome, output and process indicators as appropriate.
- Review the literature in relation to the topic or learn from the work of others.
- Consider interviewing a few of your target group to identify issues and suggest the focus and important areas to include. These preliminary interviews may also be useful to identify issues about use of language and the way to present and address sensitive issues.
- Draft questions together with a suggested response method.
- Only include questions you need. Make sure that you don't already hold the data.
- Consult with stakeholders, including your users, to review the questions and spot any gaps.
- Refine your questions and choose the best response type.
- Clarify who is eligible to answer the different parts of the questionnaire and use filter questions to move respondents to questions which are relevant to them.
- Check the logical flow of the questions.
- Check that the questionnaire is an appropriate length for its purpose and target group.

Note: Questions related to 'outcomes' refer to change brought about by your organisation's activities and services; questions about 'outputs' concern the activities and services themselves; questions about 'processes' relate to how you do things, for example, how well you communicate with users.

Main criteria when drafting questions

Throughout this process, you should be guided by three main criteria:

- Questions should be easy to understand and answer, encouraging a response.
- Questions should be relevant to the agreed survey aims and objectives.
- Questions should be valid.

Ask questions that encourage a response

This means asking questions that are simple, self-explanatory and visually appealing. Avoid questions that:

- are lengthy
- ask two or more questions at the same time
- are ambiguous or can be misinterpreted
- use jargon or unnecessary technical language.

Ask questions that are relevant

It may be tempting to use the questionnaire as an opportunity to pick up other information, but this is likely to make it longer and less appealing to the participants. You will get a better response from questionnaires that are short and to the point.

If you are assessing your project or organisation's outcomes, your questions need to relate clearly to the outcomes you wish to monitor, so take each of your outcome indicators in turn and think about how best to express them as questions. For example, if the project is working with unemployed young people, an outcome may be: 'Young people are more work ready.' You may have the following indicators:

- level of motivation to find work
- level of confidence in seeking work.

You could ask:

- How keen are you to find a job at the moment? (motivation)
- How confident do you feel about applying for work? (confidence).

However, you may get more objective evidence of both motivation and confidence with the following question:

- What steps are you taking to finding a job?

You may then ask follow up questions on having a CV ready, or job applications and interviews.

If you are designing your own questionnaire, you may not be able to test whether your questions are valid scientifically, but it is worth reviewing questions to check whether they are really likely to measure what you intend to measure, or to just give related information. For example, be aware that questions about attitudes or feelings are unlikely to give you information about behaviour: asking 'How many pieces of fruit have you eaten in the last week?' will provide better information about healthy eating habits, than 'How important is fruit in your diet?'

Types of questions

There are two main types of questions:

- **Open questions** – used for descriptive answers.
- **Closed questions** – used to provide quantitative information.

It is often helpful to use a combination of both.

Open questions

Open questions allow people to respond in any way they wish. A question such as: 'What difference has our support made to you?' gives people the opportunity to provide greater detail about what they value about your services, or the difference you have made to their lives, than a closed question would. Open questions can be most helpful to find out about people's experiences, perception, views and feelings when used sparingly in self-report questionnaires, particularly when you want to explore a topic more. Participants can be invited to supplement tick answers with further explanation in a comment box, or you may have a final question, such as: 'Do you have any further comments?'

However, people often use open questions because they have not fully identified more targeted questions against which they could get quantifiable responses. Open questions give the respondent a broad remit and the possibility of identifying what he or she considers to be most important. On the other hand, respondents may also be influenced by what they think is expected as a response, and may not identify something that is not uppermost in their mind, but significant.

You should recognise the amount of time required to analyse responses to open questions. If you do use open questions, avoid the temptation to select a few quotes from the qualitative information provided, but otherwise leave this information unanalysed; this would be to lose the full value of the exercise.

Closed questions

Closed questions ask the respondent to choose between two or more possible responses, often by ticking or circling a box.

There are different sorts of response options:

Two options only – where there is a choice between two opposing options, such as Yes/No.

Multiple choice – these should cover all potential options, which may be ordered or not. By adding an 'other' option with a text box to explain, this will allow for options that you don't know about, or avoid a list that is too long. Items on the list should be mutually exclusive. Make it clear whether the respondent should choose one or many options.

Scaled – where a response is made against a continuous scale. The scale may mark frequency or degree.

Ranked – respondents rank options in order of importance. In online surveys you can use the option to randomise the list, so that it is presented in a different order to each respondent. This will counteract a tendency for people to choose options at the top of the list.

These are some points to note if you are using closed questions:

- Avoid using too many rating scale type questions as people will get tired of them.
- Make sure the scale you are using works for each item you are asking people to rate.
- Where you are offering a choice of responses, try to avoid giving the impression that there is a right answer.
- Even where your questionnaire uses mainly closed questions, add a final question, such as, 'Is there anything else you would like to add?'

Scaled questions

Scaled questions are a type of closed question which allow you to gather information in a structured way. There are several types of scales, which allow measurement against a predetermined rating. They are often used to assess attitudes and satisfaction levels. Scales can be presented in different ways:

- number scales – for example, rating from 1 to 5
- symbols or pictures – for example, smiley faces
- physical objects – for example, moving counters on a board
- statements for users to agree/disagree with.

The most common scales require a response to a number of statements. There may be a simple choice between agreeing or disagreeing with the statement. Or, as in the Likert-type scale (a balanced five- or seven-point scale with a neutral middle point), one of the most popular methods of measuring attitudes, there is a range of possible responses as shown below. Statements may be worded in a positive or negative manner.

A scoring scheme is usually associated with the response. For example:

Strongly agree = 1
Agree = 2
Neither agree nor disagree = 3
Disagree = 4
Strongly disagree = 5.

A written scale may be replaced by a combination of written and numerical scores. For example:

Strongly agree 1 …… 2 …… 3 …… 4 …… 5 Strongly disagree.

You can use the same scale and rating to compare across time.

Bear the following in mind when using scales:

- Avoid using too many different scale types in the same questionnaire.
- Express scale rating consistently from left to right, for example, from 1 to 5 or from positive to negative throughout the questionnaire.
- In most cases, use a scale of between four and five points (maximum ten). A detailed and long scale may be more sensitive than you really need and will require more time for analysis. Often, when findings from longer scales are reported, detailed scale points are collapsed anyway.
- You may use a central neutral point, but use an even number of scale points if you want to avoid respondents picking the middle or neutral option. However, note that forcing the respondent to take any one side may provide invalid data if they really are neutral. You could check for the effect of your choice when you pilot test the questionnaire.
- Explain each point on a numerical scale as this will help users to understand exactly what you mean and will give you better quality data. It will also be easier to analyse and present.
- Allow a 'don't know' or 'not applicable' option to avoid a non-response where these apply. On the other hand, this may give respondents an option to avoid answering the questions.
- In most cases, opt for a balanced scale, with an equal number of positive and negative statements. If you do choose an unbalanced scale (for example: poor; average; good; very good; excellent), be aware that this may bias the responses.
- Avoid using words such as 'frequently' or 'rarely'. Instead, explain what you mean by using options such as 'at least once a week,' or 'less than once a year.'

Advantages and disadvantages of types of questions

The following table shows some of the main advantages and disadvantages of open and closed questions.

Advantages of open questions	**Disadvantages of open questions**
Open questions: • allow respondents to answer freely • may produce detailed responses • don't lead respondents to a suggested response • require respondents to think about their answers • can provide insight into respondents' true feelings and views • can produce information on unexpected outcomes.	Open questions:: • may produce unclear responses • require more effort from respondents resulting in unanswered questions in questionnaires • produce a large amount of data for analysis • make it hard to categorise and analyse the responses.
Advantages of closed questions	**Disadvantages of closed questions**
Closed questions: • are simple and quick to answer • tend to get a higher response rate • can help respondents to recall relevant information • can convey areas of interest to the respondent • can be easier to quantify and analyse the responses.	Closed questions: • may result in respondents ticking boxes without thinking about their answers • may influence how the respondents interpret the question through the answer options • may not give respondents the choices that reflect their real experiences, views and feelings • do not show whether respondents have understood the question or not • do not allow respondents to explain responses or raise new issues.

Writing good questions

Good questions are ones that provide valid information against the important areas of enquiry and more specific indicators, and that allow unexpected data to emerge. The foundation for this is drafting questions that people can understand and are willing and able to answer.

Common mistakes

Questionnaires frequently have a list of questions that are too long. This is likely to discourage respondents, so it will be better to split your list into two groups with different subheadings.
Avoid words that are not self-explanatory. For example, 'Did you find our procedures transparent?' may leave the respondent unsure as to what you really want to know. Sometimes respondents may be uncertain how to respond to a question that is insufficiently clear. 'How long have you been mentoring?' could refer to a person's mentoring record with a specific service, or in a more general sense. Option statements may be ambiguous, as in the following example:

6. How do you feel your mentoring relationship is going?

	Strongly agree	Agree	Neither agree nor disagree	Disagree	Strongly disagree
I feel listened to					
I feel supported					
I feel happy					
I feel confident					

In this case, both ‘I feel happy’ and ‘I feel confident’ are ambiguous. Does the question ask whether the respondent feels happy or confident in general, or happy and confident with the relationship?

When you provide some explanation to illustrate what you mean by your statements, be careful that you don’t imply a value judgement. For example, the respondent may feel confused when being asked to indicate agreement to the following statements:

- I feel able to spend more time with positive people (eg, people who volunteer with the local community).
- I feel confident talking to people I don’t know (eg, to share my problems and experiences).

In the first of these, this would be better expressed as ‘I feel able to spend more time with people who have a positive effect on my life.’ In the second case, the statement is likely to lead to confusion between confidence in talking to new people and sharing problems and experiences; these are not the same thing.

Tips for writing questions

It is important to make sure that all questions are relevant to the respondent and/or their organisation, and can be answered by them without significant time or effort. However, writing good questions is largely about how you phrase them:

- Keep questions short – a maximum of 20 words per question wherever possible.
- Avoid using leading questions such as, ‘Would you say you feel more a part of the local community than before?’ It is better to ask neutral questions such as, ‘How often per week do you meet with friends locally? or ‘What local activities are you involved in?’ Alternatively, provide a statement with a range of agree/disagree options. Remember that you may have to ask these same questions before and after engagement with a project.
- Don’t ask a question that contains two separate questions within it. For example, ‘Has your knowledge of the subject increased and your confidence improved as a result of the course?’
- Steer clear of any abbreviations, jargon, technical or other unfamiliar terms.
- Avoid using double negatives, as in the statement: ‘I don’t feel confident when meeting new people,’ followed by a response selection of: all the time/sometimes/never.
- Relate questions to the present day or a specific, recent, short time period (for example, ‘Over the past week, how many times have you…?’)
- Questions should be clear, unambiguous and straightforward. For example, ‘Since, you started with the project, how stressed are you feeling?’ (less stressed/about the same/more stressed) rather than ‘Have things improved for you?’
- Avoid questions requiring or suggesting a simple yes/no answer if you need more detailed

information. For example, ‘Has the project helped you?’ could be replaced by: ‘How have you benefited from using our services?’ (Response options: no real benefit; get out of the house more; made new friends; learned new skills; feel more confident).

- When constructing your questions, avoid making assumptions. Ask, ‘Did you gain new skills?’ (yes/no) before asking, ‘Please list the skills you have gained;’ or have a ‘no new skills gained’ in the response options.
- Make sure responses to most questions are quantifiable. For example, questions should have boxes to tick, or a choice of numbers on a scale; space for qualitative responses can add to quantifiable information on a given topic. For example, a tick list against possible areas of change could be followed by the question: ‘Please tell us more about how these changes have made a difference to you’ or ‘Please explain how our services have helped you to make these changes.’
- Avoid making sensitive questions appear too intrusive. For example, for questions about debt, alcohol use or other personal issues, ask for responses in broad categories (such as a range of alcohol units consumed) with tick boxes.

Putting the questionnaire together

The overall structure

As you start shaping your questionnaire, whether it is paper-based or online, start with direct, easy-to-answer questions, leaving more intrusive or complex questions later into the questionnaire. However, note that if your questionnaire is too long, some people may leave the more complex questions unanswered. As a general rule, group questions on the same topic together.

The following structure is a guide to ordering your questions.

The opening

In the introduction, make the following clear: the purpose of your survey; details of the organisation (or possibly a funder) sponsoring it; who is carrying it out (possibly external consultants); and how the information will be used. Emphasise that the information provided will be treated confidentially.
It is helpful to give an indication of how long it will take to complete the questionnaire. Give clear information about the closing date and any incentives that you are offering, such as a prize draw, even if this has been detailed in the covering email or letter. You may also wish to provide a contact if participants have a query.

Using helper questions

Auxiliary or ‘helper’ questions will make your questionnaire flow more easily and logically, and make it more user-friendly.

Introductory questions

These ‘warm up’ questions will help to capture interest in the survey, and may help move the respondents into the more important questions, as well as giving you information that you need.

2. How did you hear about volunteering with the mentoring service? (Please tick as many as apply.)

- [ ] By personal recommendation
- [ ] From information on the website
- [ ] Through a direct enquiry about opportunities
- [ ] From previous experience of the service

Screening questions

Screening questions find out whether the respondent meets the characteristics that make them eligible to answer the question, or part of the question. People can receive the same survey but answer different questions according to their function, or whether they had received different services.

According to their answer, you may want to direct them to a different part of the questionnaire, as in the following example:

5. Please say which of these best describes how you contact the service. (Please tick one only.)

- ○ As an older person requiring advice or support
- ○ As a family member or carer enquiring for someone else
- ○ As a professional

Transition questions

Transition questions help move the respondent from one topic to another. In hard copy questionnaires, these will follow a question such as: ‘Have you read any of our guidance papers, available on our website?’ with: ‘If no, please go to question 6; if yes, please continue with question 5.’

With online questionnaires, you will be able to design the questionnaire to exclude respondents from certain questions or pages which don’t apply, and take them on to the appropriate question based on their answer using ‘skip logic’.

The ending

Profile questions

You will usually need some profile information in order to compare your respondents against the characteristics seen in the whole population of interest, if you know this information. This will tell you how representative your respondents are in terms of demographics and other factors. You will also need this information if you want to compare the responses for different subsets, for example, by age group, or if your respondents represent organisations, by size or type of organisation.

Such data is particularly important to give responses about outcomes a context, and to help you interpret and report findings. It will be useful to understand whether the outcomes achieved were influenced by profile issues, by the frequency or length of their contact with the service or, for example, whether they were receiving a complementary service from another agency. However, bear in mind that too many questions may limit the quality and quantity of your responses, so focus on the most useful information.

People may find personal questions sensitive (particularly if they are about ethnicity, financial or employment status, for example) so it is helpful to place profile questions at the end of the questionnaire, making it clear in your introduction to this section why you are asking the questions and that the data will be confidential. You should also include a ‘prefer not to say’ option.

Finishing the questionnaire

Thank respondents for completing the questionnaire. With an online survey, you should be able to generate an automatic ‘thank you’ email.

Your draft questionnaire – a checklist

- Will the respondent be clear about the survey deadline, how to complete and return it, and how to answer each question? Are your instructions clear and simple?
- Is your language easy to understand? Have you avoided abbreviations and eliminated unnecessary jargon and technical terms?
- Does the questionnaire present as competent and professional? Is it grammatically correct and consistent in style throughout?
- Are your questions short and simple in structure? Have you asked one question at a time?
- Is there any danger that your questions could be misunderstood? Are questions, or different response options, likely to be interpreted in the same way by different groups?
- Have you avoided leading and loaded questions?
- Have you constructed your response options as positive statements, avoiding negative and double negative statements?
- Have you consistently provided an ‘other’ category, where none of the options apply?
- Have you made a consistent use of rating scales? Will there be any confusion from different types of response options used? Do lists work in the same way throughout the questionnaire as far as possible?
- Do your questions avoid making assumptions about the respondent and what they may be familiar with? Have you used screening questions appropriately?
- Are the questions and response options relevant to your target audience? Will they have the information that you ask for?

Designing the questionnaire

Allowing enough time

When you are planning your questionnaire, allow enough time to design it once you have drafted the questions. You will also need time to redraft after you have pilot tested the questionnaire (see page 24). Not only is the design itself important, but you will find this stage gives you an opportunity to see if your questions need revising or refining. If you are issuing a paper-based copy of an online questionnaire for those who can't access the internet, you will need to check that the hard copy will work well.

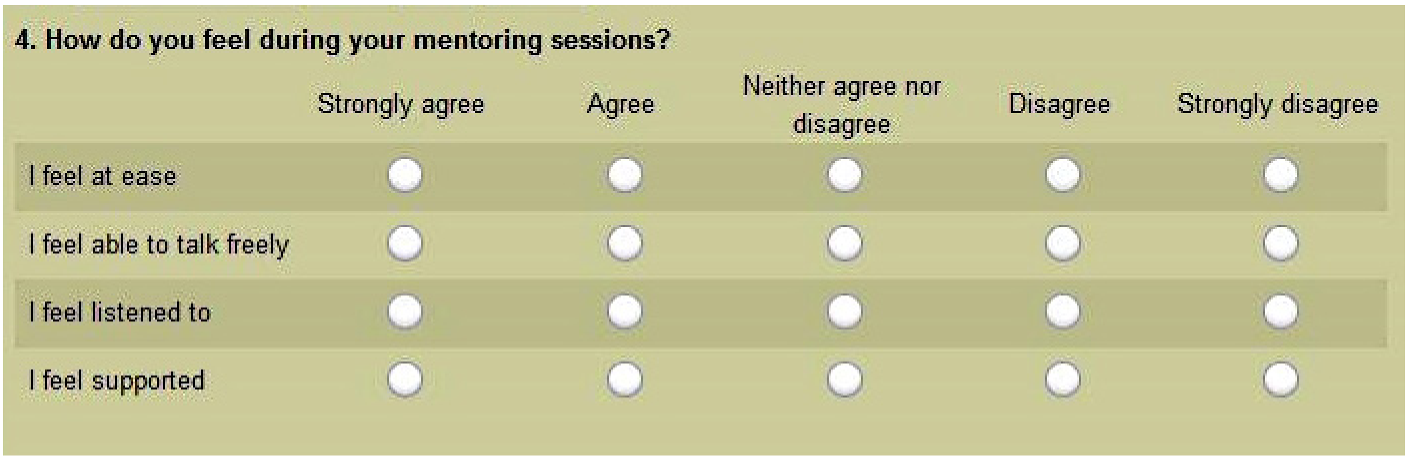
Instructions

- Provide overall instructions at the beginning of the questionnaire, and specific instructions for each question. For example, instructions may be simply: 'Please tick as many as apply' or more complex, as in: 'Please tell us about how you've been feeling over the last week by ticking the statements that most accurately reflect how you are at the moment.'
- For online questionnaires, you may wish to explain if respondents can begin the survey and return to it later. You can customise the 'next' buttons to be most user-friendly to your target group.
- For online questionnaires, you will have the option to make any question compulsory, which will prevent respondents moving on before they have answered – and a compulsory question may be necessary as part of filtering and guiding participants through the questionnaire. It may be tempting to use compulsory questions more widely, but there is also an argument that this goes against a principle of voluntary participation. It is not something you can do with a paper-based questionnaire, so this needs consideration.

Choosing your response options

The main design options for responses are the following:

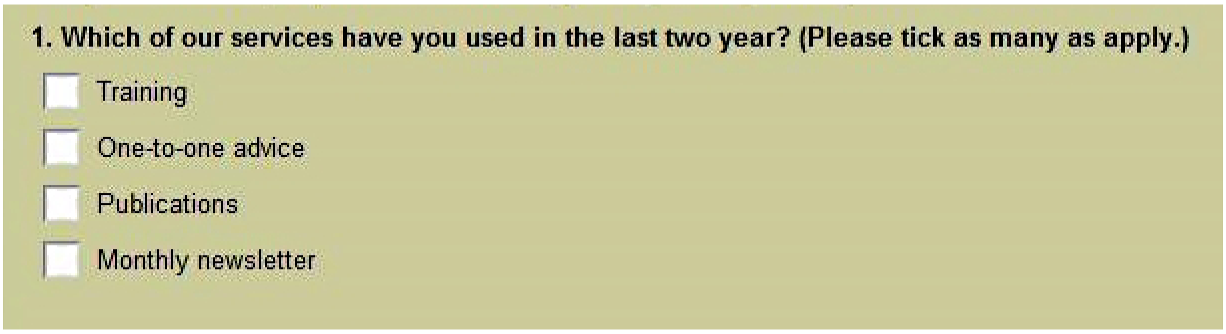
- Option buttons or boxes used for multiple choice or rating scales.



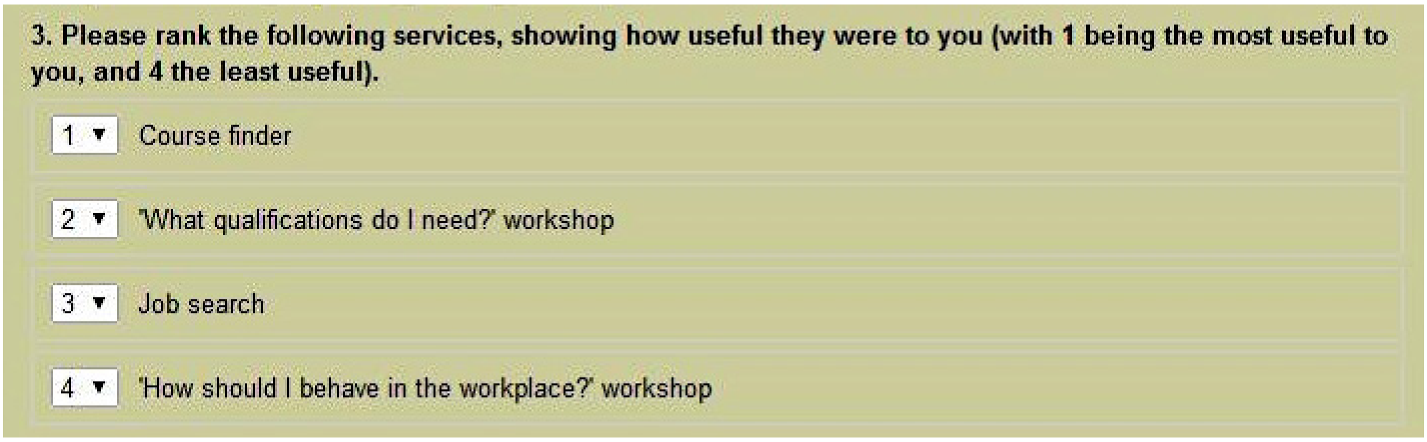
4. How do you feel during your mentoring sessions?

	Strongly agree	Agree	Neither agree nor disagree	Disagree	Strongly disagree
I feel at ease	○	○	○	○	○
I feel able to talk freely	○	○	○	○	○
I feel listened to	○	○	○	○	○
I feel supported	○	○	○	○	○

- Tick boxes for choosing one or more options from a list.


1. Which of our services have you used in the last two year? (Please tick as many as apply.)
- [ ] Training
- [ ] One-to-one advice
- [ ] Publications
- [ ] Monthly newsletter

- Rank order matrices. These ask respondents to list items in order of importance or preference.


3. Please rank the following services, showing how useful they were to you (with 1 being the most useful to you, and 4 the least useful).

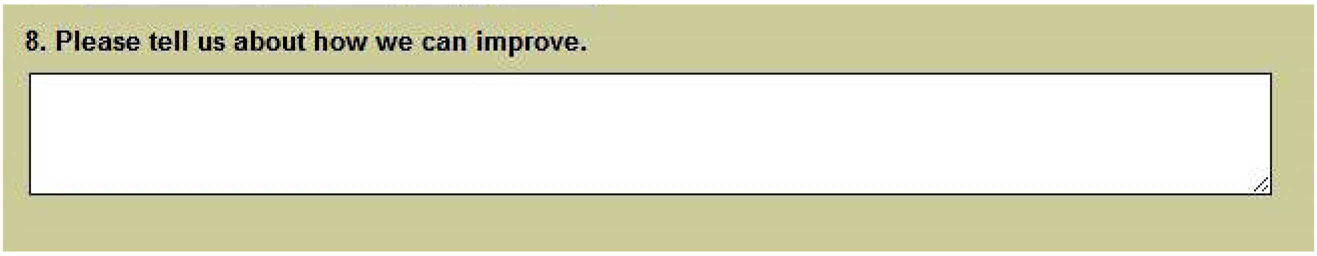
1 ▼ Course finder

2 ▼ 'What qualifications do I need?' workshop

3 ▼ Job search

4 ▼ 'How should I behave in the workplace?' workshop

- Open-ended text boxes used for open questions. In online questionnaires, choose the size of box that will be most appropriate for your question and expected length of response, and keep the box widths the same throughout.


8. Please tell us about how we can improve.

- For online questionnaires, a drop-down menu can be set up for a lengthy list of options.


2. Please say which of these best describes how you contact the service. (Please tick one only.)

As a family member or carer enquiring for someone else ▼

As an older person requiring advice or support

As a family member or carer enquiring for someone else

As a professional

For online questionnaires, it is helpful to become familiar with the different options for responses before you start designing your questionnaire.

Design tips

There are some simple guidelines that you can follow to make your questionnaire look more inviting and to get a better response, whether your questionnaire is online or a hard copy.

Designing an effective questionnaire

- For online questionnaires, make sure that your welcome screen is welcoming.
- Your first questions should be short, easy to answer and interesting enough to gain attention.
- Use bold or italics to direct attention to important words.
- Check the readability of the font, and any colours used in an online survey.
- Use font and font size that will best serve your target respondents.
- Limit the line length of your questions and response options.
- Map questions out on the page to make sure it is attractive, while bearing in mind overall length. For longer online surveys, think how to break the questionnaire into separate sections and pages.
- Make your question numbering clear – either numbering sequentially throughout the questionnaire or according to each page.
- Use subheadings and clear explanation to guide people through the questionnaire.
- For all questions, give simple, exact instructions on how to answer (for example: tick the box; circle the number; add any comments in the space below).
- For online questionnaires, choose the question type carefully.
- For both online and hard copy questionnaires, make sure there is enough space for qualitative answers.

Making the questionnaire accessible to different groups

It will be important to design your questionnaire so that it is accessible, making sure that the experiences, views and perspectives of different groups are heard, and limiting coverage bias. It may be useful to consult with organisations that have specific experience of working with particular target groups to make your questionnaire more accessible, and there may be resources that you are able to access – for example, for people with learning disabilities or dyslexia.

Remember that if your target group is older people, a proportion may have sight difficulties. If you are using an online survey, check whether you can create a questionnaire in an accessible format for respondents with visual disabilities. Websurveyor can create surveys for respondents who use screen readers. Use bright and distinct colours which provide contrast and are the easiest to distinguish. Blind and partially-sighted people can access electronic documents by using software, and they will be more accessible than paper-based questionnaires. The software can enlarge text on the screen, read it out, or show it in braille. But it is important for the questionnaire to be designed appropriately, and it will be helpful to get guidance on this.

Basic guidance on making printed documents more accessible includes the following:

- Use a minimum font size of 12 point. Be prepared to print in 16 point or 20 point.
- Use a sans-serif typeface like Arial or Helvetica, avoiding italics and ornate typefaces.
- Make sure there is a good contrast between the background and the text.

- Use a left alignment and allow for generous spacing between paragraphs.
- Use bold rather than upper case for emphasis.

Pilot testing

Piloting (sometimes called pre-testing) is the live test of the survey and is really the last step in finalising the questions and the design of the form; it's a vital stage, so don't leave it out.

Ask your pilot test participants to complete the questionnaire and to provide feedback to specific questions, such as:

- How long did it take you to complete the questionnaire?
- Did the questionnaire feel the right length?
- Were there any questions that you didn't understand?
- Were there important response options that were missing?
- Did you feel comfortable answering all the questions?
- Is there anything important missing?

Use your pilot responses to test out your data entry and analysis as well, to make sure that it will work as expected before you roll it out. Analysing the responses will help you to see whether the wording was clear, whether participants understood the questions in the same way and felt able to respond. Most importantly, the pilot will show whether the questionnaire is producing information that is relevant to your survey's aims and objectives. The pilot test should give you feedback on the design as well as the content. Make sure that it doesn't take more than 20 minutes to complete, although you will want to keep most questionnaires much shorter than this.

Administering the questionnaire

An overview

When we talk about 'administering' the questionnaire, we mean how you get your questionnaire out to your sample, and how you collect the responses and make sure that you get a good response rate. The context in which you are working will often suggest how and when to administer the questionnaire. For example, after a training course or a conference, you may be able to distribute a questionnaire on the spot. On the other hand, you may want time to elapse before you ask questions, in order to find out about further action that participants have taken as a result of your intervention. If you are providing an advice service, you may obtain a sample of your clients over a period of time, asking permission to send them out an immediate and later follow-up questionnaire, taking email addresses if they have them, or postal addresses where not.

You should consider a number of factors that might allow people to participate or prevent them.

- How likely are your potential respondents to have access to an email or internet?
- What wider issues might prevent respondents from accessing or responding to the questions?
- What particular needs might some groups have, and what can you do to help them to participate?

There are a number of ways that you can make sure that you get good coverage, for example, distributing the questionnaire through websites and email lists. If you decide to use an online survey, you may want the option of printing a paper copy of questionnaires as an alternative for respondents; there may be a number of reasons why people would prefer a hard copy.

Use intermediaries where helpful to distribute hard copies to named respondents. Think about how you can work with partners and other agencies to distribute the questionnaire, for example, national organisations, networks or intermediary agencies that may be able to advertise the questionnaire. However you distribute the questionnaire, carefully compose a covering text explaining its purpose and how you propose to use the data, making clear the deadline for response.

Choosing your sample

There are two main issues to consider before choosing your sample:

- Do you want to be able to make inferences from your data to the whole population – that is, to present findings that will apply to a wider group than those in your sample?
- What size do you want your sample to be?

Type of sample

If you want to present conclusions about your whole population based on findings from the sample, then you will need a probability sample, drawing a random selection of participants from a defined sampling frame (see page 6).

You may not be able to use probability sampling because you can't draw up a sampling frame including the whole population; this will be the case with most online surveys that are not available to, or accessed by, all your target audience. However, organisations frequently obtain information about outcomes from a convenience sample, which is a type of non-probability sample, allowing people to self-select to take part. You can still get valuable information and useful insights from this type of sampling.

Whichever type of sample you use, it will be important to get as good coverage as possible, and to make the responses as representative as you can. In some cases you may be able to use a snowball approach to reach groups for whom you have no direct access – by asking individuals or organisations to refer your survey on. This can be useful to access hard-to-reach groups.

If you ask respondents to provide information about their characteristics (for example, where they live, age, gender, other relevant characteristics), it may be possible to monitor the response rate from particular groups; you will then be in a position to take specific action to encourage responses from a group for which you notice there is a low response.

Size of sample

When choosing the size of your sample, assume anything between a 15 per cent and 40 per cent response rate. There are no absolute guidelines for choosing a sample size for non-probability samples, but the general rule would be to reach as many as you can within the time and resources you have available, selecting the largest sample you can afford. However, if your sample size is too small, it may call into question how reliable and useful the data is. Most guidance points to a sample of 30 being the minimum that would be useful, while you may not need more than 500 – while trying to reach at least 10 per cent of your overall population.

Remember that if you want to analyse results for subsets within the sample (for example, those who received different levels of service, or by age range, ethnicity or other demographic), you will need a larger sample, so that there are enough responses in each subset.

Using online surveys

Bear in mind some of the advantages and disadvantages of using an online survey. These are set out in the table on the next page.

Advantages of online surveys	Disadvantages of online surveys
• They are cost efficient. • They are environmentally friendly. • There is a quick response time. • You should be able to import a respondent list from another software programme. • You should be able to import your email address book. • You should have the option of sending pre-notification emails and thank you emails. • You can save the questionnaire as a template to use again. • The survey will be able to compute basic statistics. • You will be able to export data to statistical analysis software for more complex data analysis. • They allow many design options, question formats and response options. • People are more likely to answer open questions in depth in an online questionnaire. • People may find it easier to answer sensitive issues. • You will be able to track responses. • They are easier to use for skip logic.	• It may not be efficient for a smaller group of respondents. • Responses will be limited to those who have internet access. • It may not be appropriate for specific groups or types of respondents. • It may not be appropriate for feedback that is close to the event or required quickly. • Responses may be limited by your sampling frame (for example, if you are assessing need, using your contact database will exclude other potential users). • Care will be needed to maintain anonymity. • They may not be appropriate for sensitive information, where face-to-face interviews based on a structured questionnaire might be better. • Other methods (such as group-administered questionnaires) may encourage a greater response. • It may be less appropriate for longitudinal studies as the response rate will be difficult to control. • You need to ensure that participants respond only once.

Online questionnaires have many advantages and, if you are aware of the potential difficulties, you can take steps to reduce their effects. For example, you can assign a unique identifier to each respondent to prevent people from entering multiple responses.

Ethical considerations

Informed consent

Respondents should be given enough information to allow them to make an informed choice as to whether to participate. Your questionnaire participants should receive the same ethical consideration as if they were involved more deeply in a research study.

Informed consent in questionnaires

Participants should be clear:

- what the survey is about
- who is sponsoring the survey
- how the data will be used and that their data will be confidential
- how long it will take them to complete the survey
- if they will be required to provide any further information
- what benefits or discomfort/risks there may be (for example, if they are asked to give sensitive information)
- that participation is voluntary.

You can use your invitation letter or email to provide this information. It should also be contained in the introduction to the survey itself.

The Data Protection Act 1998 requires you to make it clear in the introduction who is carrying out the survey and how you will handle the data confidentially. For advice on data protection call the Information Commissioner's Advice Line on 01625 545745 or visit www.ico.org.uk

Confidentiality and anonymity

It is helpful to think about confidentiality and anonymity in advance, and it should really be part of your early planning. Confidentiality (not disclosing the information in an unauthorised way) and anonymity (making sure respondents are not identified) will require separate consideration.

In many cases, respondents will want to know that their responses are confidential, and you should make proper arrangements to protect the data. When you report results, there are many situations where you may risk jeopardising confidentiality, for example when using quotes, or case examples, but also potentially with quantitative information. Survey results from small groups present difficulties, and you should avoid presenting results from groups of less than ten.

In order to understand your responses better, it's often important to gather some demographic information from your respondents. You may want to know who has filled in your questionnaire, and check if responses correspond to the profile of your user group, or other group(s) you are targeting. Or you may wish to analyse the data by respondents' age or other demographic to see if there are any differences in the information provided. Very often you won't need to identify who has responded, so you can reassure people that their responses will be anonymous.

However, you may want to follow up responses, for example by a short telephone interview. In this case, you will need to have names and contact details, but you should always give people the option not to provide this information. You may decide to code questionnaires with an identification number so that you are able to connect information to individuals if you need to. You may be able to connect answers to demographic or other information you already hold, for example, in a membership database or case records. So, don't ask people to complete information that you are already able to access elsewhere.

Getting a good response rate

There are no absolutes about what will be a good or an acceptable response rate, as this will depend very much on the circumstances in which you are issuing the questionnaire: the better you know the respondents, the more likely you are to have a higher response rate. Although you might want to aim for a 50 per cent to 60 per cent response rate, research shows that response rates for email surveys range between 24 per cent and 76 per cent, while for web-based surveys the response rates are approximately 30 per cent – lower or similar to the response rate for postal surveys.

A poor response rate means that you are introducing bias. Remember that those who return questionnaires most readily are likely to be those that have either a really positive, or a really negative, viewpoint. You need to proactively search out and encourage those who may have views less fixed either way, or who do not normally have their voice heard, to return the questionnaire. Response bias is a particular concern with online questionnaires as samples will be biased towards those who have online access and are comfortable with the medium.

There are a number of ways that you can encourage a good response rate:

- Whether you are distributing a postal questionnaire or an email questionnaire, write a brief invitation to accompany the questionnaire. You may also contact your sample before to let people know that the questionnaire will be on its way and invite them to complete it.
- If you are posting a link to the questionnaire on different websites, or through electronic newsletters and bulletins, include key points in a short paragraph.
- Make it clear who you are.
- Explain the purpose clearly.
- Explain why the survey is important.
- Tell people how long it will take to complete.
- Offer assurances about confidentiality and anonymity.
- Use plain English.
- Keep the explanatory text short and simple.
- Thank the reader in advance.
- Provide contact details, for example, if respondents want an accessible version.

Once the questionnaire is ‘live’, check your responses regularly against your planned satisfactory response rate. You are likely to increase the response rate by follow-up invitations, reminding people of the deadline and briefly capturing the purpose of the questionnaire again. You may decide to extend the deadline if you feel additional time is likely to have useful results. There are different opinions as to whether reminders should be sent more than once, but a second reminder is definitely a maximum.

If you are sending email invitations, you can send the reminder to everyone on a distribution list, or you can remove the addresses of those who have completed the questionnaire, and send the reminder only to those who haven’t yet responded. For online surveys, your software should allow you to track the email address or name associated with each response.

If you add a unique number or identifier to each questionnaire, this may help you in tracking or identifying your participants.

Using incentives

The main incentive to participate is that respondents feel that it will be in their own interest or that of their organisation (although this may not motivate them so much). Illustrate how the survey is important, for example to develop a better understanding of needs, to improve the service and promote better outcomes, or to get new funding; tell respondents if important decisions will be made on the basis of the findings. Reassuring them about how the data will be used and about confidentiality will also help.

Research has shown that more obvious incentives are also effective for increasing response rates for online surveys, so make it clear in your publicity for the questionnaire if respondents can enter a prize draw, for example for gift vouchers. Choose your incentive carefully and make sure that it will be appropriate and valued by the audience. You may be able to offer them vouchers to attend training, or a free publication or other resource.

Thank-you notes

Remember that you may want to survey the same people again, so offering to send a summary of the survey findings, and saying thank you is not only good practice, but may help future responses. If you are using a web-based survey host you can write a thank you email and have it sent automatically soon after the respondent completes the questionnaire. Another option is to wait until all the responses are returned and then send the thank-you message to the entire list at once.

If you are using an online survey, let respondents know that once they click the submit button, their responses have been submitted. You may also be able to redirect them to your own organisation's website.

Factors affecting response rates to questionnaires

Positive	Negative
• The questionnaire is sent direct to the person/department who will respond, with a clear explanation of its relevance.	• The questionnaire is distributed with blanket coverage, with the hope that enough appropriate people will see it.
• The questionnaire looks attractive and straightforward to complete.	• The questionnaire looks messy, crowded and complicated to complete.
• The questionnaire is short and to the point.	• The questionnaire is lengthy and all-embracing.
• All questions are relevant to the respondents and their organisation.	• Many of the questions do not apply to the person/organisation responding.

(cont. on next page)

• Respondents can relate strongly to the topic or the concerned project/organisation. • The organisation/individual can see a benefit to them – perhaps in terms of service improvement or personally (like a prize draw). • The questions are clear and unambiguous. • The information to complete the form is easily retrievable and accessible. • The questions are received as neutral and objective. • The questionnaire includes clear instructions for completion, and response times are realistic. • The questionnaire includes the deadline for responses and any return details.	• Respondents don’t feel invested in the topic or project/organisation and are reluctant to respond. • The organisation/individual can see no benefit to them from responding and providing the information. • The questions are lengthy, complicated and ambiguous. • The information is not available without a great deal of time and effort spent on obtaining it. • The questions make assumptions, for example about the organisation. • Instructions for completion and deadline for responses are not clear. • There is inadequate time to get enough responses.

Using the data from questionnaires

Analysing the data

Designing and administering your questionnaire, and getting a good response, is only the first half of your survey process. When you were at the planning stage, you should also have considered how you were going to analyse the data, write up the findings and distribute them.

Many organisations fall into a trap of attaching less importance than necessary to this stage. Even if you choose an online survey and have the statistical analysis done for you automatically, you still need to decide about any subset analysis, and have to carry out the analysis of the qualitative data. Unless your questionnaire is quite short, it is likely to be useful to cross-tabulate relevant questions to test a specific hypothesis, for example, whether those clients who had been attending the project for longer than one year had better outcomes. You may also want to make a demographic comparison between responses, testing whether there was any difference for different age groups, education levels, or geographical areas, for example.

You need to consider issues to do with your sample, your overall response rate and that for individual questions, and who responded. How well did the respondents reflect the overall population? It will be useful to present this information alongside your survey findings. You should also consider how questions were interpreted, and which ones gave you low response rates and how this affects your ability to meet your questionnaire aims and objectives.

Interpreting the data

When you designed the questionnaire, you did so to make it as relevant as possible. But it's also important to check, when you are analysing and interpreting your data, to what extent you obtained valid results, and to look at any likely bias that might have been introduced. Bear in mind how survey error might have biased your data.

Your findings need to be clear and precise. You need to be careful not to misinterpret and make sure that your findings are a true reflection of what the question asked and the response to that question. For example, if you have asked whether respondents spend more money on social activities, don't report responses as if they relate to the amount or quality of social activity.

There is a frequent tendency to 'smooth over' results. A common error is to claim a broadly positive result because a majority of responses were positive, without taking into account the size of the majority, or without looking at what might be a significant minority of negative responses. For example, 'Only 38 per cent of pupils reported very little change or no change in their behaviour' could be misleading because of the use of the term 'only'. You need to ask how important this frequency is and what it might mean.

It will also be important to identify in what conditions positive and negative responses were given. If you are looking at changed knowledge, skills, attitudes and behaviour, for example, ask which participants are showing this change, and clarify their original starting point.

What is a 'survey error'?

A survey error is when the questionnaire results do not provide valid evidence about the population. There will be some element of bias in any sample simply because of the natural level of variance between any two samples. With a bigger sample, you can be more confident that this bias or error will be less likely. This 'confidence level' can be established for probability samples.

For either type of sample, you should consider both coverage and non-responses.

Coverage

Your original sampling frame may not have fully represented the population of interest. This may happen when you don't have access information (such as postal addresses or email addresses) for some of the relevant population, and they can't be included in the sample. Sometimes questionnaires are accessed by people picking up a form as they come into an organisation over a period of time; this will exclude those who did not visit, but who may be an important element in your target group. For online surveys, people may not have access to the internet, and these people may have important differences from those that can access it.

Non-responses

You may include potential respondents as part of your sample, but they choose not to participate:

- They might choose not to respond at all.
- They might skip particular questions.
- They might close the questionnaire without completing it.

Those who don't participate or respond selectively may have different characteristics from those who do participate, or participate fully – a difference that you will not be able to capture.

Writing the report

Once your data has been analysed, the final important step is communicating your findings in a well-structured report. Your report should contain all that people need to know about your survey and its results. You will also possibly use other, briefer formats and a variety of media for communicating headline results. Consider how you can report the results back to the survey respondents.

There are three main components of the report:

- **Background to the report**, including the purpose of the survey, who carried it out and when, sampling details and other information about collection methods.
- **A detailed breakdown of the results**, highlighting data of particular significance. Use charts and tables to make it easier to view the results, particularly important points, using descriptive text to explain your charts. Look through all your charts to make certain that they offer a clear illustration of the findings. Make clear if all or some of the respondents were asked particular questions and what the response rate was for each question. Don't confuse the frequency of responses with popularity or importance.
- **Present results against the precise question asked**; be careful to present chart titles that properly represent the question. At the foot or top of a table, show the total raw respondent numbers and the total percentage.
- **Conclusions and recommendations suggested by the data**. These should be expressed clearly and concisely so that management decisions can be made and action plans built around them.

It will be helpful to summarise your key findings in a short executive summary, which is usually attached at the front of the report. You may also want to attach the full questionnaire as an appendix to the report.

Evaluate and learn from the process

Make sure that you record some of the learning about what worked and what didn’t as you went through the process of drafting the questions, involving other people, designing the questionnaire and administering it. Your pilot testing should have picked up on a number of learning points, but more will become apparent when you do your analysis, so make sure that you take note of these.

Each time you carry out a questionnaire, it is likely to present its own challenges, but each time you will become more skilled and are likely to get better results.

Glossary

Aims describe the changes you plan to achieve in your user or target group.

Closed question (or closed-ended question) is a question in which the respondent is given a choice of replies.

Confidence level is an expression of how confident a researcher can be of the data obtained from a sample. It is often expressed as a percentage; the most commonly used confidence level is 95 per cent.

Leading question is a type of question that is phrased in a way that suggests what the answer should be or indicates a certain point of view.

Evaluation involves using monitoring and other information to make judgements on how your project is doing.

Inputs are the resources you put into an organisation to carry out an activity. Inputs may be human, material, financial or expressed as time.

Indicators are well-defined information which can be observed or measured. They can be used to assess whether outputs, outcomes and impacts are being achieved.

Impact is the long-term, broad and sustained change resulting from your activities and services, and may relate to a wider population than your target group. Impact is likely to relate to your overall aim, although there may be unexpected or negative impacts.

Monitoring is the routine, systematic collection of information for the purpose of checking your project's progress against your project plans.

Non-respondents are individuals who have been invited to participate in a survey and do not respond; it is not possible to draw conclusions about why there is non-response to the questionnaire or any of its questions.

Open question (or open-ended question) is a question that does not include a list of possible responses, and the respondent is free to answer in full.

Objectives describe the planned areas of activities by which you are going to achieve your aims.

Outcomes are all the changes, benefits, learning or other effects that happen as a result of your activities. Outcomes can be end or intermediate (also called interim outcomes). Intermediate outcomes are steps along the way to end outcomes. They are often smaller changes that happen before the final, desired outcome can be reached.

Population is the total group of respondents of interest.

Pilot test (also pre-test) is a live test of the survey by a small group of respondents before it is distributed more widely. Feedback on the content and design of the survey tool will allow problems to come to light.

Reliability is the extent to which a measure provides consistent results across repeated testing.

Respondents are the individuals who participate in the survey.

Response option is a possible answer to a closed-ended questions.

Sample is a subset that is derived from a target population which is used to represent the whole group.

Sampling frame is the source from which a sample is taken. It will list all the elements in the population which can be sampled and may provide information which will help to provide a representative sample.

Survey error is when survey results do not provide valid evidence, because bias has been introduced through the sample and coverage, or through non-responses.

Target population is the entire group of possible respondents. Because it is improbable that you will survey every individual in your target population, you must survey a smaller subgroup of your population, known as a sample.

Validity refers to whether the measurement tool accurately and appropriately measures what it is supposed to measure.

Web survey is a type of survey methodology in which a link is provided to a web host that takes the respondent to an HTML form that is completed and submitted through the computer. Web surveys can also be embedded on an organisation's own website.

Further information and reading

CES services

CES is committed to improving the effectiveness of the voluntary sector by developing its use of evaluation and quality systems. We provide a range of training courses, consultancy, support and publications. For more information, contact CES on: 020 7713 5722 or visit our website: www.ces-vol.org.uk

Other publications from Charities Evaluation Services

CES has produced a wide range of guides on monitoring and evaluation. Our publications list has full details.

You might find the following particularly helpful:

Guide	Description
The CES Resource Guide: Evaluating outcomes and impact (2013)	A guide to over 130 resources on monitoring and evaluating outcomes and impact, including approaches, methods and creative tools, sub-sector specific guidance, and links to useful websites containing further resources. Free to download: www.ces-vol.org.uk/informationcollectionmethods
Assessing Change: Developing and Using Outcomes Monitoring Tools (2010)	Practical handbook to help you identify and develop ways to collect information on the outcomes of your work. Free to download: www.ces-vol.org.uk/assessingchange
Information collection methods: Choosing tools for assessing impact (2013)	This practical guide will help you think through how to collect the right data to demonstrate the outcomes and impact of your work. Free to download www.ces-vol.org.uk/informationcollectionmethods
First Steps in Monitoring and Evaluation (2002)	A basic guide for organisations who are looking at monitoring and evaluation for the first time. Free to download: www.ces-vol.org.uk/firststepsme

Next Steps: Monitoring and Evaluation on a Shoestring (2011)	A practical guide to help organisations develop their monitoring and evaluation approach and improve their effectiveness on a limited budget. Free to download: www.ces-vol.org.uk/shoestring
Practical Monitoring and Evaluation: A Guide for Voluntary Organisations, 3rd edition (2009)	Comprehensive guide to monitoring and evaluation in the voluntary sector, now in its third edition. Available from: www.ces-vol.org.uk/practical
Your Project and its Outcomes (2007)	A guide focusing on how to identify outcomes and their indicators and how to assess their achievement. It uses case examples throughout to demonstrate different stages of the process and different types of organisation. Free to download: www.ces-vol.org.uk/freedownloads
Keeping on Track: A Guide to Setting and Using Indicators (2008)	A guide to help third sector organisations improve their skills in setting output, outcome and process indicators. Free to download: www.ces-vol.org.uk/ontrack
Using ICT to Improve Your Monitoring and Evaluation (2008)	This work book covers the steps and issues you need to consider in developing appropriate computer systems that will help you monitor and evaluate your work. Free to download: www.ces-vol.org.uk/freedownloads
Making Connections: Using a theory of change to develop planning and evaluation (2011)	This guide provides an introduction to the theory of change approach to planning, monitoring and evaluation, explaining why and how to use it. Free to download: www.ces-vol.org.uk/theoryofchange

Discussion papers	CES' series of papers on evaluation covers seven important topics, including outcomes monitoring and assessing impact. Available from: www.ces-vol.org.uk/discussionpapers

Other publications

Barbour, R (2013) Introducing Qualitative Research: A Student's Guide, Second edition, SAGE.

Blair, J, Czaja, FR and Blair, EA (2013) Designing Surveys: A guide to decisions and procedures, Third edition, SAGE.

Kumar, Ranjit (2014) Research Methodology: A step-by-step guide for beginners, Fourth edition, SAGE, London.

Sue, VM and Ritter, LA (2007) Conducting Online Surveys, SAGE.

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