Welcome to PA 5933 – Survey Methods: Designing Effective Questionnaires

I would like to first make a land acknowledgement.

The University of Minnesota-Twin Cities respectfully acknowledges that the land we are on today is the traditional and ancestral homeland of the Dakota people. The University of Minnesota is founded as a land-grant institution and we recognize that our founding came at a dire cost to the Dakota people. The Dakota were forced to cede their lands in return for goods and services, but the government did not uphold the terms of these treaties leading to widespread devastation. We recognize this painful past, and we honor Dakota peoples’ history on this land, their sovereignty, and their continued contributions to our region.

Minnesota comes from the Dakota name for this region, Mni Sota Makoce — "the land where the waters reflect the skies." The Dakota and numerous other Indigenous peoples, whose cultural, spiritual, and economic practices are intrinsically woven to this landscape, hold this land sacred. We recognize them as original stewards of this land and all the relatives within it, who had thriving and vibrant communities prior to disruption by settlers. Today, the State of Minnesota shares geography with eleven Tribal Nations. By offering this land acknowledgement, we affirm tribal sovereignty and hold the University of Minnesota accountable to recognize and counter the historical and contemporary injustices that continue to impact Indigenous people, through mutually beneficial partnerships, research, policies, and practices that respect Indigeneity.

https://marlenamyl.es/project/dakota-land-map/?fbclid=IwAR2RWA7yITEYniQV5PwhDTdy4zwKbyAi-AVx-poHQo-hp8AytfIAkt7hLc%20%E2%80%A8
**Requirements met by this course.** MPP students may use this class to meet requirements for the Advanced Policy Analysis Concentration.

**Course Overview**
This class provides an applied (hands-on) introduction to designing survey questionnaires. Students will learn:
- How to design a questionnaire in a team
- Best practices for survey and question design.
- Pitfalls of survey design – names, definitions, examples.
- How to use Google Sheets to track questions, coded responses, and prompts for interviewers.

Each time it is taught, student teams will design a questionnaire for a real or imaginary client, typically a non-profit/NGO, researcher, or government agency.

In Spring 2022 the class has been asked to produce a **survey of graduates for Humphrey School masters students**. The client team includes two faculty at the Humphrey School, Professor Greg Lindsey and Professor Joe Soss. Prof. Lindsey is responsible for the Master of Urban and Regional Affairs (MURP) degree and Prof. Soss is responsible for the Master of Public Policy (MPP) degree. Assistant Dean Diana Beck will be part of the client team, as may Project Specialist Sarah French.

Areas of questioning would likely include:
- Experiences on what is going well in curriculum
- Holes/gaps in the curriculum
- Equity and inclusion in the curriculum
- Focus and quality in the core for each of the degree programs

*Look for the symbol § (double-s); it will indicate that a reading is related to the client’s focus.*

*Some flexibility is built into this class, to be responsive to client and student needs.* As a class, we may decide to focus in ways not apparent from the initial syllabus, or rearrange the order of topics. Readings/videos/podcasts will be added to later weeks as appropriate.

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**Client’s Statement**

The Humphrey School Academic Programs Department would like to initiate an annual survey and assessment to gather regular feedback on the curriculum from graduating students.

The survey’s rollout will begin with the Masters of Public Policy and the Masters of Urban and Regional Planning.

This survey will be used as an advisory process to provide student feedback for continual adjustment and improvement to the curriculum and to identify potential areas of gaps or overlap. Data received from the survey will also be reported in aggregate as part of regular accreditation processes for the MPP and MURP.
Students will actively engage in class about draft questions and through that practice learning how to improve them. By taking this class you agree to allow the instructor to share your homework/survey submissions (but not your grade) with the class and with the client, as part of our discussions. The instructor will behave respectfully about all submitted work, which will be presented anonymously, although authors will have the opportunity to take ownership if they want.

Spring 2022: HHH Academic Technologist Mary Maronde will program our survey in Qualtrics. Some students in this class may decide that they want to learn Qualtrics (outside of class) and participate in the programming of the survey, under Ms. Maronde’s supervision.

This class is not a substitute for a comprehensive survey research class, such as EPSY 5244 or PubH 6810, or a statistical course on sampling and weighting, such as STAT 5201. It will spend little time on: alternatives to surveys; recruitment; sampling; web-based survey software such as Qualtrix; sampling errors; weights; survey administration; or analysis of data.


Software: Google Sheets

Website: A Canvas website will include links to online videos and readings.

Expectations about in-class and out-of-class time

Covid challenges. This class is not designed to be hybrid. It will be in-person with the option of having some sessions that are remote. Our classroom is not set up to allow for a successful hybrid class or even successful Zoom recording of an in-person class that you might miss because of illness.

Canvas. You are expected to set your Canvas notifications to allow (do not opt out of) announcements. If I am ever unable to teach, that is how I will let you know; you will get an email message from Canvas.

Attendance. Attendance is required at all classes and outside-class group meetings. If you have a legitimate reason for missing class (such as illness), kindly email the instructor and your group members before the class/group meeting you will miss.

Consistent effort. In order to succeed in this class, you need to keep up with assignments, as survey work is cumulative.
Teams. Students may sometimes work in teams of 2-4 members. We will decide how to approach our task together, including when/whether team work is appropriate.

Time commitment. The word “homework” is so limited. It is far from describing the amount of learning that is done outside the classroom. UM policy states that for each credit hour of a class, graduate students are expected to work *more than* 2 hours on outside-of-class work. This is a 2-credit class, so you should expect at least 4 hours of work outside this class each week, but 5 hours is more realistic.

Deadlines
Survey assignments are due on **Sundays at 3 pm** so that I am able to review them before class. Other assignments are due on Sundays at midnight.

Grading
Some grading will be done on the check (good/excellent), check-minus (incomplete/problems), zero (not submitted) basis. My hope is that your work will be motivated by interest rather than grades. And that this will feel more like an apprenticeship than a traditional class: my feedback is intended to improve your craft.

There will **not** be a Canvas gradebook. Ask the instructor if you have a question about your grades.

**Grade break-down (approximate):**
- 70% Individual or team *survey assignments*: probably 11 @ ~6% each
- 15% Individual: homework problems, mini-quizzes and posts
- 15% Class participation, including group members grading each other if appropriate

**Guiding principles for interactions among us:**
- Much of what we do will be “brainstorming” ideas about survey questions and critiquing proposed questions that others have suggested. All the critiquing needs to be done kindly. Combining kindness with what you understand/believe – even if you are scared to say it – will lead to the greatest learning. We will often ask both, “How does this question work well?” along with “How could it be improved?” Being *kind, truthful, and receptive* to others’ perspectives will make this practice effective.
- Be *curious* and – I hope – truly *interested*. What does one question explore, and what does it miss? What is the goal? Ask questions, even if that feels scary. The goal is not to be politically correct but to learn. When others ask questions, answer respectfully.
- If anyone feels *disrespected or upset*, that person or someone else may call a “time-out” (or make a T with your hands). We will wait quietly until the person who called the time-out is ready to talk. This option may never be needed.

**Classroom and Zoom practices:**
Students will be asked to include their gender pronouns on the class list. For example, I will put “Deborah (she)”. If gender pronoun announcement and use is new to you or you wish to learn more about gender identity and its movement, there will be additional resources provided on the class Canvas site.

In accordance with student privacy protections, no recordings of any of class Zoom sessions that show students’ faces or names may be shared outside of this course.

University and School Policies and Resources

Covid-19, Face-Covering Requirement, Symptoms, Vaccination, and Boosters
The University requires all students and employees to be vaccinated or have a valid exemption; more information is at safe-campus website. On January 5, 2022 President Gabel announced an update on COVID-19 and campus operations which strongly encourages all community members to get a booster as soon as they are eligible. For information about getting a booster and how to schedule an appointment, please refer to the University’s Get the Vax 2.0 initiative.

Stay at home if you experience any signs of illness or have a positive COVID-19 test result, and consult with your healthcare provider about an appropriate course of action. Absences related to illness, including COVID-19 symptoms, for yourself or your dependents, are excused absences and I will work with you to find the best course of action for missed work and course content. I will follow these same protocols and will let you know if the delivery of this course has to be temporarily changed as the result of my own circumstances.

Additional details can be found on our Canvas site.

Disability Resource Center (DRC). The University of Minnesota is committed to providing equitable access to learning opportunities for all students. The DRC is the campus office that collaborates with students who have disabilities to provide and/or arrange accommodations. If you have, or think you may have, a disability (e.g., mental health, attentional, learning, chronic health, sensory, or physical), please call 612-626-1333 to arrange a confidential discussion. For more information, please see diversity.umn.edu/disability. If you are registered with the DRC and have a current letter requesting accommodations, please contact your instructor as early in the semester as possible to discuss.

Center for Writing’s Student Writing Support. Student Writing Support provides free writing instruction for all University of Minnesota students – graduate and undergraduate - at all stages of the writing process. They help students develop productive writing habits and revision strategies via in-person consultations. See writing.umn.edu.

Academic Policies. For links to University of Minnesota and Humphrey School policies, please click the “U of M Policies” link on our course Canvas site, or see https://z.umn.edu/PolicyStatements. Policies include information on student conduct, scholastic dishonesty, legitimate absences, sexual harassment, equal opportunity, disability accommodations, and more. It is your responsibility to understand these policies; ignorance of the policies is not an acceptable excuse for violating a policy.

(Class does not meet in Week 1 of the semester – that Monday is the MLK Jr. Day holiday)
When I list assignments for class, I suggest that you do them in the order in which they are listed. Many readings (not the textbook!) will have sections marked that you may skip or skim.

-------- Week 2: January 24 --------
Survey question assignments are in blue.

Do before class:
- **Watch** DL self-introduction (3 minutes)
- **Watch** DL lecture about survey research (21 minutes)
- Take mini-quiz about lecture
- **Read** Robinson & Leonard textbook, pages xiii to 72 (Preface and Part I: Chapters 1, 2, 3)
- **Post** answers to R&L Design Drill, page 23, problem #2.
- **Read** § the client’s statement (1 page)

In-class time:
Introductions: instructor and students’ introductions (1 minute about your related experiences or interests)
DL will take questions about the video: elements of the survey process, and what parts this course will focus on.
Informed consent & ethics. The burden to respondents of participating in surveys.
**4:45-5:15 Clients come to class.** Introduction to the client and this semester’s project.
Discussion regarding timeline and process.
Recruiting potential respondents to interview in class.

-------- Week 3: January 31 --------

Do before class:
- **Complete questionnaire** to be used in team formation.
- **Read** Robinson & Leonard textbook, pp. 75-131 (Part II, Chapters 4 and 5)
- **Post answers** to R&L Design Drill, page 131, problem #1.
- **Read** about Qualtrics question types. Review the question types noted in Canvas. Click on each question type and read until you are sure have understood the basics.
- **Survey #1:** Each person drafts an introduction to the survey.

In-class time:
Using Google Sheets to create a survey template: example from Fall 2020 class
Sampling / recruitment of participants (briefly). Filter questions.
Question types. (Open- vs closed-ended, ...)
Response categories. (Continuous, categorical, how many, not overlapping, single vs. multiple response, etc.)
Introduction to demographic and employment (module 1) questions.
Finding questions that have been validated by others.

4:45-5:15 Visit to class by 3 leaders of Humphrey student organizations, for their input about the survey.

---------- Week 4: February 7 ----------

Filter and demographic/attributes questions

Do before class:

- Read Robinson & Leonard textbook, pp. 133-155 (Part II, Chapter 6)
- Go to https://ipums.org/, then explore IPUMS-USA, IPUMS-CPS, and IPUMS-International – in each case, select “Visit Site” then “Browse and Select Data” and then look at “Person” variables in the categories of “Demographic” and “Work” (in IPUMS-CPS these are under “Core”). Spend at least an hour doing this
  - What surprised/interested you the most? Post comments on Canvas.
- Survey #2: Each team produces one revised introduction to the survey.

In-class time:

Review and discuss #2 submissions.
Empathy and question development. Sensitive questions: identity, finance, etc.
In-class revisions of identity questions drafted by instructor.

5 pm visit to class by Janet Walsh & possibly Emily Opara re International Fellows surveys (homework for Week 5)
-------- Week 5: February 14 --------

Filter and demographic/attributes questions

Do before class:

- Read Robinson & Leonard textbook, pp. 159-178 (Part III, Chapter 7)
- Instead of doing an R&L Design Drill, practice your survey revision skills on 2 real surveys under development for the HHH International Fellows’ program.
- Watch video about cognitive interviewing (2.5 minutes)
- Survey #3: Each team revises identity questions.
- Complete Week 5 class feedback form.

In-class time:

Discuss core questions evaluating degree success.

Visitor (>5 pm): Carolyn Liebler regarding asking about race/ethnicity.

-------- Week 6: February 21 --------

Life history / retrospective questions about behaviors

Do before class:

- Take mini-quiz on readings, video (10 pts)
- Survey #4: Individuals and groups work on curriculum-related questions

In-class time:

Review and discuss some #4 submissions

Discuss cognitive interviewing & plan how to do it for this survey
-------- Week 7: February 28 --------

**Do before class:**
- Read Robinson & Leonard textbook, pp. 181-203 (Part III, Chapter 8)
- Post about curriculum-related questions in others schools’ surveys
- Survey #5: Each group reports its vision for our survey’s curriculum section

**In-class time:**
Visitor: Alyssa Fabia, potential survey respondent, provides an example of a cognitive interview to pretest survey questions. Deborah will do the interviewing.

-------- SPRING BREAK: no class on March 7 --------

-------- Week 8: March 14 --------

**Do before class:**
- Post about which curriculum-related questions to cut from our survey
- Survey #6: Individuals conduct and report about one cognitive interview

**In-class time:**
Review and discuss results of cognitive interviews; propose which curriculum questions to cut.
Revisit survey sections and their order. Finalize order!

-------- Week 9: March 21 -------- *Programming in Qualtrics begins?*

**Do before class:**
- Post:
  - Survey #7: Student services section of survey / Emailed language / Introductions

**In-class time:**
Discuss Krumpal
Work on student services section.

**After class:** Get feedback on March 25 from evaluation class
Deborah to create hand-out for PA 5311, Peter Bernardy’s class
Deborah, Rachel, Colette, Dani to attend 30 minutes / Aimee already there.
---------- Week 10: March 28 ---------- Discuss survey with clients

Do before class:
  - Post: What to keep/cut in student services section
  - Survey #8: Individuals conduct and report about one cognitive interview.

In-class time:
  Meet with clients: Joe Soss, Greg Lindsey, perhaps Diana Beck
  Revise survey questions in response to cognitive interviews.

After class:
  Deborah to put survey together in Google sheet, make available to OMS
  Qualtrics team is programming

---------- Week 11: April 4 ---------- Discuss survey with OMS

Do before class:
  - Survey #9: Tasks as discussed and allocated in class

In-class time:
  Visitor: Ms. Rossana Armson, Office of Measurement Services (OMS), will review the survey

After class:
  Qualtrics team “finishes” programming!

---------- Week 12: April 11 ---------- Final revisions for MPP/MURP survey

Do before class:
  - Survey #10: Tasks as discussed and allocated in class

In-class time:
  Qualtrics team shows us the survey in Qualtrics.
  Finalize the last questions under discussion.

---------- Week 13: April 18 ---------- Qualtrics finalized; tested by OMS

Scales about thoughts – well-being, anxiety, etc.

Do before class:
  - Watch video: “Ratings and Scales” by Prof. Graham Gibbs. Only minutes 4:00 to 8:30 are assigned.
  - Post: Do pilot test of survey, post about any glitches
  - Survey #11: Interview key informants about adding MDP and/or MHR questions for next year

In-class time:
- Talk about scales. Survey example: Family and Caregiver Experience Survey, U.S. Dept of Veterans Affairs (addressed to caretakers for U.S. veterans with polytraumatic injuries). We will review selected questions and a scale made from them.
- Discuss #11 submissions
- Discuss recruitment for Exit Survey

------- Week 14: April 25 ------- Survey goes live!

Knowledge and use/practices (what R&L call abilities)

Do before class:
- Read bio for guest instructor Bridget Griffith
- Watch two videos (25 and 23 minutes) by guest instructor Bridget Griffith.
- Read Survey instrument (“codebook” format) fielded by Bridget Griffith in Uganda in 2019, in a study of barriers and facilitators of on-time measles vaccination by mothers of young children in Kampala. The survey includes examples of questions pertaining to knowledge of, attitudes toward, and experiences with measles vaccination. This version is output from the REDCap survey software. Read pages 1-7 and 10-14 carefully and skim the rest of the survey.
- Glance over A translated version of some pages of Bridget Griffith’s survey, in English and Luganda.
- Post responses to Google Form questions related to Griffiths videos and survey

In-class time: ZOOM ONLY

GUEST INSTRUCTOR Bridget Griffiths, Ph.D. in Epidemiology. (She will be remote.)
- Introduction to KAP (Knowledge, Attitudes, Practices) surveys.
- Understanding your population & setting; adapting your survey to them.
---------- Week 15: May 2 ----------

Survey administration

Do before class:

- Team member evaluations. 10 points for completing all of them thoughtfully.
- No other homework!

In-class time:

Discuss recruitment in the context of Mokher & Pearson’s article.

Course evaluations.

No final exam, no additional assignments! 😊

RESOURCES FOR YOUR current and future USE – save this!

Journals:
- *The Public Opinion Quarterly*


Evaluating the quality of your survey:


UM Libraries have a copy of a textbook, *Epidemiology, 6th edition*, by Gordis. (Just search “Gordis Epidemiology”.) Chapter 15 has a good discussion of bias. Chapter 15 is “More on Causal Inference: Bias, Confounding, and Interaction.”

Designing household surveys:

https://openknowledge.worldbank.org/handle/10986/25338 License: CC BY 3.0 IGO.

https://openknowledge.worldbank.org/handle/10986/15194 License: CC BY 3.0 IGO.

https://www150.statcan.gc.ca/n1/pub/12-587-x/12-587-x2003001-eng.htm

YouTube and other video sources:

YouTube channel: Demographic and Health Surveys. Examples include:
- De Jure and De Facto https://www.youtube.com/watch?v=kIClwMgFcCU&list=PLagqLy-gqTTMx2Q1OCT_prJnCtM55C0o8&index=24&t=0s
- Introduction to DHS Sampling Procedures https://www.youtube.com/watch?v=DD5npelwh80

SAGE Research Methods website (via UM Libraries) has videos and many other resources, e.g.,

Survey and census examples:
- https://ipums.org includes
  - IPUMS-USA (US Censuses & American Community Survey)
  - IPUMS-CPS (US Current Population Surveys)
  - IPUMS-International (mostly censuses from around the world)
  - IPUMS-Global Health (DHS and PMA surveys for Africa & Asia)
  - IPUMS-NHGIGS (US Census data & GIS boundary files, 1790-present)
  - IPUMS-Terro (Integrated population & environment data, 1960s-present)
  - IPUMS-Time Use (US & other, mostly industrialized, countries)
  - IPUMS-Health Surveys (US)
IPUMS-Higher Ed (US)

- **World Bank – Living Standards Measurement Surveys**
  [http://surveys.worldbank.org/lsms](http://surveys.worldbank.org/lsms) - including a microdata collection of 3000+ surveys


- **General Social Survey**, a U.S. opinion survey since 1972, with questionnaires available. [https://gss.norc.org/](https://gss.norc.org/)

- **ICPSR** is a searchable repository of surveys & survey data. Recommended:
  - Read about [*ICPSR’s data management and curation*](https://www.icpsr.umich.edu ICPSR) (1 page).
  - Watch first 15 minutes of [*ICPSR: A Data Resources for Paper, Projects, and More*](https://www.icpsr.umich.edu ICPSR)