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=IwAR2RWAA7yITEYniQVSPwhDdTdy4zwKbyAI-VAx-pOHQo-hp8AyfIAKt7hc%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
- How to use interviewing software SurveyToGo (in Fall 2020, demonstrated but no student use due to Covid limitations.)

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 2020 the client will be doctoral student Leah Fulton from the College of Education and Human Development, studying higher education. She plans to field a survey and needs a questionnaire to be completed in Fall 2020. Her focus is on Black women who recently completed PhDs at American universities while raising school-aged biological or adoptive or foster children. (The women do not need to be Americans; they could be Africans, for example.) She is especially interested in those women who later move into academic careers as professors and administrators and plans to follow up the survey with interviews with such women. Survey questions will mostly be retrospective, focusing on the period of doctoral study, career choices, and connections between those choices and parenthood. Look for the symbol § (double-s); it will indicate that a reading is related to the client’s focus.

Student teams will most likely draft and revise questions about respondents’:

- Demographics and employment
- Life histories related to parenthood and postgraduate study
- Knowledge, use, and opinions about topics to be determined
- Anxiety and well-being [or another health-related scale, to be determined]

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.
The class will spend two weeks on each module, actively engaging 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, 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.

Fall 2020: Because of the challenges of teaching remotely, I have reluctantly decided that students will not use SurveyToGo (by Dooblo), an app that can be used offline on Windows devices to collect data. We will, however, see a demonstration of how to use that software.

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 Qualtrics; 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 may be the hardest semester for teaching and learning in recent history, thanks to Covid-19. In class, we need to be vigilant to stay six feet (2 meters) apart and wear masks. As an older person, I feel especially vulnerable, but I’m willing to be in the classroom as long as everyone else physically present is willing to abide by the protective rules. Online class members will need to stay focused during a long class, avoiding social media distractions and other work. We will need to figure out how to work together as one class and as several teams. A Humphrey staff member, Kelly Zarth, will be in class to monitor the chat area for questions of remote class members who don’t feel able to interrupt speakers.

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.

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 will work in teams of approximately 3-4 members. Each team will produce its
own survey for the client. This will happen iteratively. In one week, individuals will post
proposed new questions. The following week, teams will decide which among those questions
to adopt, will revise them, and will post them. The next week will be individual questions again.

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. I suggest you plan to have a 1-hour meeting with your team every
other week, as part of that time.

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):
30% Individual first drafts of questions: five homework assignments @ 6% each
35% Teams: six homework assignments @ 6% each
5% Individual: cognitive interviewing memo re: pilot test of survey questions
15% Individual: homework problems, mini-quizzes and posts
15% Class participation, including group members grading each other

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.

**Zoom/Classroom 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.
- Recordings of weekly classes will be posted to Canvas.
- In accordance with student privacy protections, no recordings of any of the class Zoom sessions that show students’ faces or names may be shared outside of this course.

**University and School Policies and Resources**

**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](http://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](http://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](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 Labor 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: September 14** ---------

*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**¹ the client’s statement (1 page)
- **Respond** to DL questionnaire to be used in team formation

In-class time:

Introductions: instructor, HyFlex/remote and in-person tech tips, students’ own 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.

Introduction to the client and this semester’s project. Discussion of research questions and survey topics.

Using Excel to create a survey template

--------- Week 3: September 21 ---------

Do before class:

- **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** Abetz, Jenna S. (2016) “‘You can be anything but you can’t have it all’: Discursive struggles of career ambition during doctoral candidacy” *Western Journal of Communication* 80(5): 539-558. (about 12 pages assigned)
- **Survey #0:** each person does a trial run by creating an Excel survey template with one question (see Canvas assignment)
In-class time:

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.

--------- Week 4: September 28 ---------

Module 1: 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 #1: Each person drafts module 1 questions in Excel.

In-class time:

Team meeting
Review and discuss #1 submissions.
Empathy and question development. Sensitive questions: identity, finance, etc.

--------- Week 5: October 5 ---------

Module 1: Filter and demographic/attributes questions
Do class:

- Read Robinson & Leonard textbook, pp. 159-178 (Part III, Chapter 7)
Post answers to R&L Design Drill, page 178, problem #1. Do this for 4-5 of your own questions from Week 3. Do it BEFORE your group meeting!


Survey #2: Team meeting to select and revise module 1 questions. One person posts to Canvas on behalf of the group (Excel attachment).

Post one pretest question for visitor (potential respondent).

**In-class time:**

Review and discuss #2 submissions.

Visitor: AshLee Smith, potential survey respondent, for a cognitive interview to pretest survey questions.

End class by doing ZIP feedback evaluation (5 minutes)

-------- Week 6: October 12 --------

**Module 2: Life history / retrospective questions about behaviors**

Do before class:


- Watch Elizabeth Loftus (2013) TED talk, “How reliable is your memory?” (17:20 minutes) [https://www.ted.com/talks/elizabeth_loftus_how_reliable_is_your_memory?language=en](https://www.ted.com/talks/elizabeth_loftus_how_reliable_is_your_memory?language=en)


- Take mini-quiz on readings, video (10 pts)

- Survey #3: Each person drafts module 2 questions

**In-class time:**

Review and discuss some #3 submissions

-------- Week 7: October 19 --------
Module 2: Life history / retrospective questions about behaviors

Do before class:

- Read Robinson & Leonard textbook, pp. 181-203 (Part III, Chapter 8)
- Explore the ATUS survey online. Go to https://ipums.org/, then IPUMS-TIME USE – select “Visit Site” then ATUS (American Time Use Survey) – click on “Get Data.” Browse TIME USE variables and ACTIVITY—Well-being module. Spend at least an hour doing this.
- Post comments on Canvas: What surprised/interested you most in your review of the ATUS?
- Post one pretest question for the visitor, a potential respondent.
- Survey #4: Each team produces module 2 questions

In-class time:

Review and discuss some #4 submissions.

Visitor: Dr. LaVonda Ulfig, potential survey respondent, for a cognitive interview to pretest survey questions.

Discuss next module.

---------- Week 8: October 26 ----------

Module 3: 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
--- Week 9: November 2 ---

Module 3: Knowledge and use/practices (what R&L call abilities)

Do before class:
- Survey #6: Each team revises and re-organizes its survey

In-class time:
- Review: what is a loop?
- ATUS discussion
- Client update, including updated study description

--- Week 10: November 9 ---

Module 4: Attitudes and opinions (what R&L call thoughts)

Do before class:
- Read about ICPSR’s data management and curation (1 page).
- Watch first 15 minutes of ICPSR: A Data Resources for Paper, Projects, and More
- Post one question for our visitor (described online).
- Watch first 22.5 minutes of video: SAGE (2017) “Ben Hardy discusses Scale Development and Survey Design.” This will also provide background for the module on scales. You will have to use your UM login to be able to see this via UM Libraries.
- Survey #7: Each team revises 1-2 survey sections
In-class time:

Guest:  Dr. Lynette Hoelter, ICPSR Associate Archivist and Director of Instructional Resources (30 minutes)

Review and discuss #7 submissions – the survey so far, and what is missing.

-------- Week 11: November 16 --------

Module 4: Attitudes and opinions (what R&L call thoughts)

Do before class:

- Post one pretest question for the visitor, a potential respondent.
- Survey #8: Individuals conduct searches for comparable (useful) questions.

In-class time:

Review and discuss #8 submissions.

Visitor: Cherise Ayers, potential survey respondent, for a cognitive interview to pretest survey questions.

-------- Week 12: November 23 --------

Module 5: Scales about thoughts – well-being, anxiety, etc.

Do before class:

- Watch video: “Indexes & Scales” by ChrisFlipp (in spite of one unfortunate grammatical error) (7:49 minutes)
- Watch video: “Ratings and Scales” by Prof. Graham Gibbs. *Only minutes 4:00 to 8:30 are assigned.*
- Survey example: Family and Caregiver Experience Survey, U.S. Dept of Veterans Affairs (addressed to caretakers for U.S. veterans with polytraumatic injuries). Review selected questions and a scale made from them.
- Survey #9: Each person searches for one previously-used scale that could be useful.

In-class time:

Review and discuss #9 submissions.
Happy Thanksgiving!

---------- Week 13: November 30 ----------
Module 5: Scales about thoughts – well-being, anxiety, etc.

Do before class:
- No survey homework over Thanksgiving break

In-class time:
How to put together the pieces of a survey. What else needs to be done?
Talking through the cognitive interviewing assignment.

---------- Week 14: December 7 ----------
Putting it all together!

Do before class:
- Survey #10: Each team revises 2 sections of the survey. 100 points!

In-class time:
Review and discuss #10 submissions.
Team member evaluations. 10 points for completing all three thoughtfully.
Course evaluations

---------- Week 15: December 14 ----------
Survey administration: SurveyToGo Demonstration

Do class:
- Post 1-2 pages describing the most likely scenario where you would have to field a survey. (Make something up!) Imagine your respondents. Empathize with your
respondents! What kind of survey administration tool/mode should you use? Why? You may want to discuss pros and cons of more than one method.

- Survey #11: Individuals/teams produce the final survey, including all sections’ revised questions, plus introductions, transitions, closings. 20 points. NOTE: The survey will be provided to our client, along with DL’s comments but not grades.

In-class time:

Discuss your imagined survey scenarios in the context of Mokher & Pearson’s article.

Visitor: Anna Bolgrien will give a SurveyToGo demonstration. We will “feed” her questions and she will put them in S2G as we watch and comment. Even in multiple languages!

---------- Final assignments ----------

Survey #12: Cognitive interviewing assignment (individual) – this means trying out the survey on volunteers and writing an informal report about what did not go smoothly and should be improved before the survey instrument is finalized. E.g., the respondent did not understand a question; a skip pattern failed; a question did not have enough response categories. Due December 20th.

NOTE: These will be provided to our client!

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:


YouTube and other video sources:

YouTube channel: Demographic and Health Surveys. Examples include:

- De Jure and De Facto https://www.youtube.com/watch?v=klClwMgFcCU&list=PLaggLv-gqpMx2Q10C_prJRnCtM55C0o8&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.,

- “An Introduction to Questionnaire Design” by Tarek Al Baghal, published by SAGE. (14:39 minutes) https://methods.sagepub.com/video/an-introduction-to-questionnaire-design

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-NHGIS (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/)