

# Planning and Conducting A Survey

Every person and community has a self-knowledge that has to be taken as a key element in designing any research, development, or political work

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This third bulletin in the Acción Mutua Formative Research technical bulletin series provides you with a broad overview for planning and conducting surveys for your HIV prevention program.

## Checklist for Planning & Conducting Effective Surveys

### 1 } Develop Survey's Objectives

- ☐ Use different formative research methods to help identify the objectives
- ☐ Obtain approval of the objectives from management and/or funders

### 2 } Design the Survey

- ☐ Choose the most appropriate type of survey
- ☐ Decide on how the survey will be administered
- ☐ Check to see if there are existing surveys with similar objectives
- ☐ Check with other colleagues or agencies conducting similar programs
- ☐ Adapt some or all questions from existing surveys
- ☐ Decide on question and response types that will get the best responses
- ☐ Prepare a draft questionnaire
- ☐ Identify samples for both the survey and the pilot test

### 3 } Pilot-test the Survey

- ☐ Decide where the pilot will be conducted
- ☐ Mail or give out questionnaires, supervise the data collection, or conduct interviews
- ☐ Analyze the pilot-test data
- ☐ Make any necessary revisions to the survey design

### 4 } Conduct the Survey

- ☐ Assign or hire staff
- ☐ Train staff
- ☐ Decide if an incentive is appropriate to get a better response rate
- ☐ Decide on a timeframe for conducting the survey
- ☐ Decide where the survey will be conducted
- ☐ Mail or give out questionnaires, supervise the data collection, or conduct interviews
- ☐ Monitor the quality of the surveys being completed
- ☐ Re-train staff (if necessary)

## 1} Survey Objectives

- ➔ An effective survey begins with specific objectives.
- ➔ Choose survey questions with the objectives in mind
- ➔ Every question should refer back to the objectives

**Example 1:** To determine the prevalence of HIV infection by race, ethnicity, age, and geographic location of women patients accessing our downtown clinic from July 1 to December 31.

**Example 2:** To identify the most common misconceptions about HIV among high school seniors at Washington High School from September 1 through the 31<sup>st</sup>.

## 2} Design Elements of Surveys

*There are 3 types of surveys:*

### Questionnaires

*See below for a description of the three types of questionnaires.*

### Structured Record Reviews

Surveys where a form is created to be used by an individual to systematically look through a collection of records to gather information.

### Structured Observations

Surveys where data are collected visually by observers in a systematic way to gather information.

*There are 3 types of questionnaires:*

### Self-Administered

Surveys that respondents complete by themselves. Questionnaires can be printed and distributed in-person, made available on location, mailed or available on-line.

### Group-Administered

Surveys that are administered by a group facilitator (i.e., questions are read aloud to respondents) and respondents complete the survey in the group setting.

### Face-To-Face Interviews

Surveys that are conducted between two people, one who asks the questions and records the answers and the respondent who answers the questions. These can be in-person or over the phone.

*(See Technical Bulletin Series #4 for more information about survey design.)*

## 3} Issues to Consider When Pilot-testing a questionnaire

- ➔ Are there any misspelled words or other errors in the survey?
- ➔ Is the type size big enough to be read easily?
- ➔ Are there easy questions mixed in with the difficult questions?
- ➔ Does the order of questions flow well?
- ➔ Are the skip patterns easy to follow?
- ➔ Do the item numbers make sense?
- ➔ Were the respondents able to follow instructions?
- ➔ Do the questions meet the objectives?
- ➔ Are the questions appropriate for the respondents?
- ➔ Is the vocabulary appropriate for the respondents?
- ➔ Is the survey in the most appropriate language for the respondents?
- ➔ Are the questions sensitive to possible cultural barriers?
- ➔ Is the survey too long?
- ➔ How did respondents react to the survey?
- ➔ What comments did respondents make?

## 4} Consider the Resources Involved When Conducting the Survey

How can you be sure that you have an adequate amount of resources (time, experience and money) to conduct your survey?  
Answer these seven questions:

1. What are the major tasks involved in conducting a survey?
2. What skills and resources are needed to complete each task?
3. How much time does each task take?
4. How much time is available to complete the survey?
5. Who can be hired or assigned to perform each task?
6. What are the costs involved in performing each task?
7. What additional resources are needed?

### *Guidelines for Assessing Reasonable Resources*

A survey's resources are reasonable if they adequately cover the financial costs and time needed for all activities of the survey in the time planned. You need to consider the following:

- ➔ Other formative research needed (i.e. focus groups, reviewing existing surveys, etc)
- ➔ Hiring and training of staff
- ➔ Deciding on the target population and sample
- ➔ Designing the survey form
- ➔ Pilot-testing the survey form
- ➔ Administering the survey
- ➔ Entering responses in to a database
- ➔ Analyzing and interpreting the data
- ➔ Reporting the findings

AIDS Project Los Angeles conducts training on survey planning and development.  
For a complete list of trainings and other services offered, please visit our website,  
**[www.accionmutua.org](http://www.accionmutua.org)** or call **213-201-XXXX**.