Data Collection Questionnaires – A Quick Guide

1. *Introduction:*

Questionnaires are a good way to collect perception data from people (stakeholders, staff, customers etc.), particularly if there are large numbers of people whose views you want. They don't have to have long lists of questions and, often, a short survey with carefully thought out questions will get high response rates and provide good quality data. Short questionnaires are particularly useful to identify "before and after" perceptions when running a project.

The time and resources needed to design, implement and analyse a questionnaire should not be underestimated. In all but the simplest cases you will need either dedicated survey software (available online) or a spreadsheet/database.

2. *Survey Design:*

Start with the end in mind! You need to be really clear what you are trying to find out and how you will use the data. Thinking about the questions is only part of the design process. You also need to consider how you want to analyse and stratify the results. Try to identify the types of graph you'll want to present, so that it's clear in your mind what data you need to gather.

You may want to analyse the results by different categories of respondent e.g. site, department, grade/pay-band, length of service, full/part-time, age/ethnicity. If so, you'll need to include an "Identifier" page, usually at the beginning of the survey. Create these categories as lists of options rather than allowing free-form answers, to ensure consistency. Be careful that you do not compromise a respondent's confidentiality. With small sample sizes you may find there is only one male, aged 40-50, who works in Dept. X, so it will be immediately obvious who the respondent is.

This also raises the question of whether or not the questionnaire should allow anonymous responses. If you can guarantee anonymity, then it may be appropriate to ask for the respondent's name, or e-mail address, particularly if you need to target people for a "post-project" questionnaire as well.

You must also be sensitive to diversity issues when designing a questionnaire. Questions might inadvertently discriminate against some individuals (e.g. those with reading difficulties), or some people might have accessibility issues, e.g. through language or visual impairment).

3. *Design Principles:*

- Keep the questionnaire focussed on your objectives and concise (avoid asking too

many questions about too many topics)
- Make it easy for people to answer the questions (they need to be clear and unambiguous)
- Ask the right types of question (avoid leading and multiple questions)

The shorter your questionnaire, the more likely you are to get a high response rate. High response rates will give you more confidence in the validity of the answers.

Every question should add value and move you closer to meeting your objective. For each question, ask yourself "what would I do if I knew the answer to this question?".

4. *Types of Question:*

The main types of question you may wish to use are:

- Multiple Choice
- Rating
- Ranking
- Open
- Closed

Try to avoid mixing too many different types of question. Respondents will find the questionnaire hard to follow and may get confused by the different types of response expected of them. Think about the logical flow of questions; don't jump around from topic to topic.

4.1 Multiple Choice:

The respondent chooses one or more options from a list; e.g.

When you want to find out about the latest Policy on XYZ, which of these sources do you go to:

1. Search the Intranet
2. Search the Internet
3. Consult a colleague
4. Ask the local subject matter expert
5. Other; please specify…

Make it clear if people are allowed select more than one option and give them the choice of adding an alternative to those on your list. If you only want people to select one item, ensure the list contains mutually exclusive choices.

4.2 Rating:

The respondent is asked to select one point on a rating scale (e.g. from *Strongly Agree* to *Strongly Disagree*). For example:

		Strongly Agree	Agree	Neither Agree, nor Disagree	Disagree	Strongly Disagree	Not Applicable
1	I have a good working understanding of key principles of Knowledge Management						
2	I have a good working understanding of the Knowledge Management (KM) Framework for sharing and learning						
3	I am able to give examples of how the KM Framework has been applied to deliver benefits within the organisation						

There is endless debate (and research) about whether rating scales should have even or odd numbers of choices and there's probably no right answer! The middle option of a rating scale often attracts a substantial number of respondents who are unsure of their opinion, or who want to "sit on the fence".
It is good practice to allow "*Don't Know*" or "*Not Applicable*" responses.

A variation on this is to use a question that has two opposite statements at the ends of a rating scale, and the respondent is asked to choose from a numerical scale between the two ends.
Make sure that you create statement that are truly "opposites" and make the instructions clear so that only one choice is to be made. For example:

Policy documents are not easy to find on the Intranet	1	2	3	4	5	Policy documents are easy to find on the Intranet
The writing style of Policy documents makes them difficult to read	1	2	3	4	5	The writing style of Policy documents makes them easy to read
Policy documents needed by our team aren't kept up-to-date	1	2	3	4	5	Policy documents needed by our team are kept up-to-date

4.3 Ranking:

Respondents are asked to place a number of options in their order of preference; e.g.

Please put the following methods of communication used by the senior management team to disseminate performance information in order of effectiveness (1 = most effective; 5 = least effective):

	e-mail face-to-face meeting team briefing noticeboard announcement intranet news item

Don't make the list too long – no more than 7 or 8 items.

Ranking questions can be quite difficult to analyse and present results. You'll probably end up with something like: "*80% of respondents rated e-mail as the least effective method*".

4.4 Open:

These are free-form questions asking for a text response; e.g.

Please tell us what you think is the best thing about working here...

Remember, these are hard to analyse, but they can give some useful insights into reasons behind responses to the other types of question. Don't have too may of them otherwise you'll spend ages trying to get any meaningful data.

Leave plenty of space for responses.

4.5 Closed:

These questions are used to get "Yes" or "No" answers; e.g.

Have you attended the Introductory Project Management Workshop?	Yes	No
Have you been briefed on the new Document Security Policy?	Yes	No
Have you visited the Help Pages for the new Case Management System?	Yes	No

If the questions are clearly targeted, you shouldn't need to give people a "*Don't Know*" option.

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5. *Wording of Questions:*

It's very easy for words and instructions to be misunderstood and this is particularly the case in questionnaires where there is no opportunity for the respondent to seek clarification.

Make sure that your instructions are absolutely clear. Keep sentences short, use lots of white space on the page and avoid jargon or words that may not be understood by everyone. Ask somebody independent to read it through for you and, if possible, do a small pilot of the questionnaire to ensure that your questionnaire works.

Other things to be aware of…

5.1 Multiple questions should be avoided: For example, the following should actually be two different questions. One is about plans and one is about performance.

To what extent does your Line Manager keep you informed about new plans and business performance.

Or, this one, which should also be two questions…

My Line Manager is good at solving problems and never jumps to conclusions without having the facts.

5.2 Leading questions should be avoided: For example:

"Do you prefer system X or System Y?"

The respondent may prefer neither of these options.

5.3 One small word can alter the meaning of a question radically: for example:

"Staff have access to the latest policies and procedures" may get a very different response to… "Staff always have access to the latest policies and procedures".

5.4 Begin with easy/safe questions: If your questionnaire is going to touch on sensitive issues, start with questions that are "safe" and build towards the more difficult ones. You don't want to put people off right at the start.

5.5 Check spelling, punctuation and grammar: If you're not confident in your spelling, punctuation or grammar, ask someone who is, to help. Always get your questionnaire proof-read before it is issued.

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6. *Administrative Details:*

Recipients will need to know:

- The purpose of the questionnaire (what incentive is there for people to respond?)
- What you plan to do with the results (including whether they will get to see them)
- How you will deal with confidentiality
- Where, when and who to return the questionnaire to (provide a reply-paid envelope if necessary)
- Who to contact for help, or to answer queries

Often, it will be helpful (and will increase response rates) if you brief people before issuing the questionnaire. If you can do it face-to-face you will be able to explain its purpose and answer any of their questions. Alternatively, send out a briefing note, prior to issuing the questionnaire.

Generally, you will need to allow people a couple of weeks to respond (which makes allowances for holidays or absence). Any longer and they may forget. Try to avoid issuing surveys around major holiday periods (Summer/Xmas). It's often worth sending out reminders a few days before the deadline, particularly if it's looking like you've got a low response rate.

We've not discussed sample sizes here as that is a subject in its own right. Suffice it to say you will have to choose whether to send questionnaires to the whole target population or to a sample, sub-group. If you decide to use samples, they need to be representative. You could use random sampling, or systematic sampling (e.g. choosing every 10th person on the staff list). Sampling methods become very important where you need to demonstrate the statistical significance of your results.

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