



Planning Effective Surveys with Newcomers

Guidance for resettlement staff on quality survey data collection

A survey is a data collection method that allows you to systematically gather information from a defined population. This guide walks through five steps to take when planning surveys and provides additional tips and resources that can help you in the process.

Introduction

Before you start thinking about what data you need to collect, whether through surveys or other methods, it's critical to first **identify what you want to learn and why**. Take adequate time to [define purposeful monitoring and evaluation \(M&E\) questions](#), then identify what data you need to answer them, whether qualitative or quantitative.

For details on this process, see Switchboard resources including this [Data Collection Planning Worksheet](#), the [information guide](#) and [Switchboard Short](#) on managing data collection priorities, and this [M&E Plan Template & Checklist](#).

Step 1: Assess whether surveys are an appropriate data collection method.

Once you have defined your M&E questions and the data needed to answer them, decide whether a survey is the best method for gathering this data. Here are a few considerations to keep in mind:

- Surveys are best suited for capturing well-defined and easily observable information.
- When they contain **closed-ended questions** with defined answer choices, they produce **quantitative data**, which is generally easier to aggregate and analyze.
- Generating useful data from a survey requires good knowledge of the subject area as well as skills in survey questionnaire development.
- Surveys are among relatively few data collection methods with the potential to produce **generalizable data**. When data is generalizable, findings from a sample of a population can, using statistical methods,

inform conclusions about the full population (see below, Step 2, *Sampling*).

Consider, for example, a refugee extended case management (ECM) program. Suppose the program manager aims to make the program's services more client-responsive. An example of an M&E question the program manager could answer via a survey is, "Do clients find our extended case management (ECM) services to be useful?" This question could be answered by clarifying what "useful" means in context and asking respondents to select from a range of options.

For a more detailed comparison of the pros and cons of different data collection methods, including surveys, focus group discussions, interviews, and observation, see Switchboard's [Overview of Common Data Collection Methods](#) quick reference table.

Step 2: Develop a data collection plan.

After you have decided a survey is the right data collection method, but before writing your questionnaire, create an appropriate plan that is relevant for the respondent population. A **survey data collection plan** can be developed on its own or as part of an evaluation or research plan. It should cover the following topics, including roles and responsibilities for each:

Sampling. The generalizability of survey data depends on the sample size and composition. A **sample** is a subset of a population selected to study and inform conclusions about the population as a whole. Unless you plan to collect data from *all* members of a target population, carefully planned sampling is necessary.

Ethics, including processes for obtaining informed consent. For more information, see Switchboard's [Obtaining Meaningful Informed Consent from Newcomers](#) guide and sample [Informed Consent Form](#).

Mode of administration. Surveys may be **self-administered** by respondents or **enumerated**, i.e., administered to respondents via interviews conducted by a person, called an enumerator, who is trained to record responses. The table at top right lists a few pros and cons of these modes.

Type of instrument. Whether self-administered or enumerated, surveys can be completed on paper, online, or on a device such as a tablet or a phone.

	Pros	Cons
Self-Administered	No interviewer bias Lower cost No need to arrange interviews Can reach larger geographical area	Respondents need to be literate If survey is online, respondents need Internet access and computer literacy
Enumerated	Higher rate of survey completion Enumerator can explore respondents' answers and assist with unfamiliar words/questions	Possibility of enumerator bias Higher cost Need to arrange, hold interviews May be difficult to reach certain populations

Frequency of data collection. Clearly describe the timeline on which data will be collected.

Pre-testing and piloting. See Step 5, below.

Data management and quality. Plan your system for managing survey data, such as a well-structured spreadsheet or database that includes **controlled lists** (dropdown menus) for each survey answer choice. Also plan how you will maintain **data quality**—ensuring data is complete, correct, and consistent.

Data analysis, interpretation, and use. Plan for analysis methods and tools that are appropriate for what you aim to learn. Spreadsheets are well-suited to generating descriptive statistics, while statistical software packages enable more rigorous statistical analysis. Maintain the focus on action when planning for interpreting, disseminating, and using your results. Plan how you will ensure findings are presented and shared in an appropriate way, with the relevant audience, and within a reasonable timeframe to inform decision-making.

Step 3: Develop your survey questionnaire.

Make sure that each question in your survey questionnaire **directly aligns with your learning priorities**. Map out your M&E questions, the data needed to answer them, and the survey questions that will enable you to collect that data, including the format each question will use.

Throughout this process, keep the focus on purpose, guided by the M&E questions you defined. Though it can be tempting to include “nice-to-have” questions in your survey, only include questions that will help you learn what you need to learn.

While developing your survey, don’t write new questions unless you have to! Check if a survey questionnaire already exists that would enable you to collect the data you need, especially one that has been **validated**, or tested and determined to consistently measure what it intends to measure. Many [validated mental health screening tools](#) exist, for example, often translated in multiple languages. Keep in mind that modifying a validated tool typically means it is no longer validated.

For the questions you do develop, **use clear, neutral language**. Avoid acronyms, jargon, and complicated sentence structure. Your survey will not yield useful results if respondents misinterpret or fail to understand what they are being asked. Language choice is important not only in question wording but also in any predefined answer choices or scales. The table below lists some common issues found with survey questions, which may mislead or confuse respondents and/or introduce bias into your results.

Returning to the example M&E question from earlier about the usefulness of ECM services, one reasonable way to assess this would be to measure the percentage of clients who report that ECM services have helped them achieve their service plan goals. This could be a simple yes/no question, or you could offer an intermediate option.

For example:

- Survey Question: How would you rate the truth of the following statement? “Working with Caseworker [Name] helped me achieve my goals.”
- Answer choices: “Very true,” “Somewhat true,” “Not at all true.”

Be sure to **carefully consider your respondent population(s)** at this stage. A good practice is to closely involve members of the population of interest in developing survey questions. When possible, work with native speakers to write questions in respondents’ language first. If this is not possible, or if the survey will be delivered in many languages, use back translation to check for any inconsistencies in translated versions. If you are not able to translate surveys in advance, it is best practice to engage a qualified sight translator and/or interpreter when enumerating the survey.

Also, carefully consider the **sensitivity** of the questions you include. If not strictly needed, remove any questions that respondents may be unwilling to answer. Where sensitive questions are unavoidable, it is extremely important to prioritize respondent safety, ensure confidentiality, and protect data collected, including personally identifiable information (PII).

Finally, only include questions that respondents can answer easily. Don’t expect people to remember too much—they may not recall as much as you assume.

Issues to Avoid When Writing Survey Questions		
Issue	Example	Revision
Double-barreled question	How useful did you find the transportation orientation and the meetings with your caseworker?	How useful did you find the transportation orientation? How useful did you find meetings with your caseworker?
Double negative	Rate whether you agree or disagree with the following statement: I would not mind if the weekly ESL class was not held in-person.	Rate whether you agree or disagree with the following statement: It is important that the weekly ESL class is held in-person.
Leading question	Would you be available to attend a job fair held on the weekend if it increased your chances of getting a job?	Would you be available to attend a weekend job fair?
Unbalanced answer scale	How would you rate your overall experience interacting with Caseworker Amina? - Good - Very good - Excellent	How would you rate your overall experience interacting with Caseworker Amina? - Poor - Fair - Good - Excellent

Step 4: Develop an adequate budget.

Survey costs can be high relative to other data collection methods. They can depend on several factors, including sample size, mode of administration (enumerated surveys are generally more expensive), choice of instrument, and linguistic needs such as translation or interpretation. **A typical survey budget will include:**

- Staff time for personnel with the necessary skills in survey design, sampling, and data analysis
- Staff benefits based on total staff time needed
- Travel costs if needed for enumerator training, site visits, and dissemination
- Costs associated with administering surveys, such as mobile devices and data plans
- Costs associated with managing and analyzing data, such as software licenses
- Data collection and project management supplies (e.g., laptops, monitors, office supplies, etc.)

If you are considering conducting a survey as part of a research or evaluation project, Switchboard's [Research/Evaluation Budget Checklist](#) can help guide your overall budget development process. Also see [Switchboard's Research/Evaluation Time & Effort Calculator](#).

Step 5: Pre-test and pilot your survey.

Before administering your survey at scale, dedicate adequate time to pre-testing and piloting. These critical steps can help you identify confusing questions, questions that don't yield expected results, linguistic concerns that did not emerge during translation, additional needs for enumerator training, unanticipated budgetary concerns, etc.

First, **pre-test** your survey: Identify a group of 5–10 people who share characteristics with the target population. Arrange for them to complete the survey in your presence, one at a time. Ask them to read each question out loud (or, if not literate, to listen to the question aloud and discuss it with you). Encourage them to ask questions and provide feedback, taking notes throughout.

Second, **pilot** your survey. An effective pilot implements the entire survey data collection process but on a smaller scale than is ultimately planned. This includes recruiting and training enumerators (if applicable); administering the survey to members of the target population using the chosen instrument and draft questionnaire; and managing, quality checking, and analyzing the data collected. This enables you to collect

initial data while identifying issues that might be costly and difficult to resolve at scale. A robust pilot process is especially useful for more complex surveys.

Conclusion

Surveys can be a powerful data collection tool for resettlement programs. The structured data they provide and the potential to collect information from large numbers of clients make surveys a popular choice among service providers.

However, surveys can also be resource-intensive and require care to design properly. The steps and tips presented in this guide can help you assess the quality of your questions, harness existing instruments, and streamline your planning processes to administer high-quality surveys and learn more about your programming.

Resources

[Practical Advice for Selecting Sample Sizes](#): This Donor Committee for Enterprise Development resource includes a detailed introduction to sampling strategy.

[Cross-Cultural Survey Guidelines](#): This comprehensive guide from the University of Michigan covers best practices for developing and administering a survey that involves different languages, countries, and cultures.

[How to Write Awesome Survey Questions: Parts 1 and 2](#): This two-part guide by Tools4Dev offers concrete, bite-sized tips for writing survey questions that your audience can easily understand and respond to.

[How to Pretest and Pilot a Survey Questionnaire](#): This Tools4Dev resource offers additional guidance on pre-testing and piloting surveys.

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