Introduction:

This *Survey Checklist* provides a list of the key elements of a well designed survey. It can be used to evaluate an existing survey and/or to review a new survey before it is piloted. The completed checklist will provide you with information about the strengths and weaknesses of your survey and highlight areas for improvement.

To use the checklist:

|  |  |  |
| --- | --- | --- |
| **Process** | **Person Responsible** | **Completed**  (sign & date) |
| 1. **Complete the ‘survey details’ table.**   This provides essential background information about your survey and encourages you to clearly articulate the purpose and intended audience for your survey. |  |  |
| 1. **Apply each of the checklist questions to your survey.**   Utilise the comments section to document any specific issues or the questions you need to review (e.g. re-write question 11 in plain English).  Be mindful that there are some circumstances where it is justified to omit an element (e.g. if your survey only asks one simple question, the introduction may be very brief to match the scale of the survey). |  |  |
| 1. **Modify your survey as required.**   Make the necessary changes to address the issues identified in the checklist. |  |  |
| 1. **Re-apply the checklist to ensure you have updated all of the relevant elements.**   It can be useful to ask a second person to complete the final review as it can be difficult to identify issues in your own work. |  |  |

Limitations of the Checklist:

|  |  |
| --- | --- |
| C:\Users\Kate\Desktop\silver exclamation.png | This checklist is designed to assist you to review whether your survey includes key information and follows the general principles of good survey design. |
| It will not provide you with information about whether a survey is the best way to collect the information you require, nor whether you have included and prioritised survey questions appropriately. These elements should have been carefully considered when planning your consumer feedback strategy and used to guide every element of your survey development. |

Survey Details:

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Name of survey:** |  | | | |
| **What is the purpose of the survey?**  *Consider how this survey fits with other elements of your evaluation and your broader quality improvement activities.* |  | | | |
| **How will the survey be administered?** | Paper based | Electronically | By Phone | Other |
| **Who is the target group?**  *Is there more than one target group? (e.g. current clients of your program, previous clients of your program, parents of children attending your program, carers etc.)* |  | | | |
| **Does your target group have any particular needs?**  *Consider the features of your target group such as age, culture, language, gender, personal characteristics and abilities (e.g. literacy, vision, cognition).* |  | | | |
| **Checklist completed by** |  | | | |
| **Date** |  | | | |

PART 1: Survey Design

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| 1. **Survey title** | | **Yes** | **Partly** | **No** | **n/a** | **Comments** |
| 1. Does the survey have a title that clearly describes what it is about? | |  |  |  |  |  |
| 1. **Introduction** | | **Yes** | **Partly** | **No** | **n/a** | **Comments** |
| **Does the introduction clearly describe:** | | | | | | |
| 1. The program / activity / issue that the survey is collecting feedback about? | |  |  |  |  |  |
| 1. The purpose of the survey? | |  |  |  |  |  |
| 1. The importance / value of the consumer’s participation? | |  |  |  |  |  |
| 1. How long the survey will take to complete? | |  |  |  |  |  |
| 1. Whether consumers can remain anonymous? | |  |  |  |  |  |
| 1. How confidentiality will be managed? | |  |  |  |  |  |
| 1. If / how the feedback will impact on the services they receive?   (e.g. negative feedback will not bias services received) | |  |  |  |  |  |
| 1. How the feedback will be used? | |  |  |  |  |  |
| 1. When the survey process will be complete? | |  |  |  |  |  |
| 1. How consumers can access survey results? | |  |  |  |  |  |
| 1. **General** | | **Yes** | **Partly** | **No** | **n/a** | **Comments** |
| **Does your survey provide clear information about:** | | | | | | |
| 1. How the survey should be returned?   (i.e. In person, by mail etc.) | |  |  |  |  |  | |
| 1. How consumers can access further information about the survey / program?   (e.g. By providing staff contact details and/or space for consumers to provide their contact details for follow up) | |  |  |  |  |  | |
| 1. **Survey Format** | | **Yes** | **Partly** | **No** | **n/a** | **Comments** |
| 1. Is the survey format and content of the survey inclusive and meaningful for all consumers?   (e.g. The survey is appropriate and relevant for the diverse range of consumers within the target group) | |  |  |  |  |  |
| 1. Is the language appropriate and meaningful for your consumers?   (e.g. Plain English has been used, there are no spelling/grammatical errors, questions are written in full sentences and acronyms/abbreviation/jargon have been avoided) | |  |  |  |  |  |
| 1. Have appropriate strategies been used to support your target group to participate in the survey?   (e.g. Large print, visual contrast, translating the document) | |  |  |  |  |  |
| 1. Are all the questions tailored to the consumers who may respond to the survey?   (e.g. Language, tense and perspective are consistent throughout the survey, n/a is included where a question may not be relevant) | |  |  |  |  |  |
| 1. Is the overall layout of the survey visually appealing?   (e.g. The pages are evenly spaced, not overcrowded with information, complex tables or graphics have been avoided, sections are clearly defined) | |  |  |  |  |  |
| 1. **Survey Format *(continued)*** | **Yes** | | **Partly** | **No** | **n/a** | **Comments** |
| 1. Are the questions and answers clearly laid out?   (e.g. The format is easy to follow, all questions and responses are laid out so that they don’t run over pages) |  | |  |  |  |  |
| 1. Is there an appropriate mix of closed and open questions?   (e.g. The questions are presented in an appropriate format, providing a balance between efficiency and the opportunity for consumers to provide additional information and ideas to describe their experience / opinions etc.) |  | |  |  |  |  |
| 1. Is the font easy to read?   (e.g. The size, style and colour of the font is appropriate for the target group) |  | |  |  |  |  |
| 1. **Survey Flow** | **Yes** | | **Partly** | **No** | **n/a** | **Comments** |
| 1. Are the opening questions easy to answer? |  | |  |  |  |  |
| 1. Are questions grouped together according to key themes? Where appropriate is each theme clearly introduced? |  | |  |  |  |  |
| 1. Are sensitive questions at the end of the questionnaire? |  | |  |  |  |  |
| 1. Is there a thank you statement at the end of the survey? |  | |  |  |  |  |

PART 2: Survey Questions

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| 1. **General** | **Yes** | **Sometimes** | **No** | **n/a** | **Comments** |
| **Is each survey question:** | | | | | |
| 1. Relevant and directly linked to the survey goals? |  |  |  |  |  |
| 1. Absolutely necessary?   (e.g. You have avoided asking questions you already know the answer to. You have a specific plan about how the data collected from the question will be used) |  |  |  |  |  |
| 1. Specific enough to provide you with the information you need? |  |  |  |  |  |
| 1. Only asking about one topic at a time? |  |  |  |  |  |
| 1. Written in plain English? |  |  |  |  |  |
| 1. Written objectively, avoiding bias? |  |  |  |  |  |
| 1. Informative enough to allow consumers to make an informed decision? |  |  |  |  |  |

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| 1. **Demographic Questions** | **Yes** | **Sometimes** | **No** | **n/a** | **Comments** |
| 1. Are the demographic questions necessary to understand who has responded to your survey? |  |  |  |  |  |
| 1. Will the demographic information be used to identify subgroups for data analysis? |  |  |  |  |  |
| 1. Have the demographic questions been presented in a way that is inclusive and respectful of all consumers?   (e.g. The diverse characteristics and experiences of your target group have been considered. Questions and answers enable equitable participation for all potential participants) |  |  |  |  |  |
| 1. **Open Questions** | **Yes** | **Sometimes** | **No** | **n/a** | **Comments** |
| 1. Are the open questions specific, indicating what type and how much information you are interested in? |  |  |  |  |  |
| 1. For phone based surveys, have prompts been documented to ensure staff can seek additional information from consumers as required? |  |  |  |  |  |

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| 1. **Multiple Choice Questions** (excluding scales – see section 11) | **Yes** | **Sometimes** | **No** | **n/a** | **Comments** |
| 1. Are there clear instructions about how consumers should answer the question?   (e.g. Tick all that apply, circle the correct response) |  |  |  |  |  |
| 1. Are the responses displayed clearly?   (i.e. Response options are directly below the text and ordered in a logical way) |  |  |  |  |  |
| 1. Do the responses provided clearly match the question asked?   (i.e. The response options provided allow sensible and appropriate) |  |  |  |  |  |
| 1. Is the response list exhaustive?   (i.e. All of the possible options are listed. Where appropriate, additional response options such as ‘other’ / ‘n/a’ etc. are included as the last option on the list) |  |  |  |  |  |
| 1. Are all the responses mutually exclusive?   (i.e. It is impossible for a person’s answer to fit within multiple response options) |  |  |  |  |  |
| 1. Where appropriate has ‘Why? Why not?’ or a ‘Comments box’ been included?   (i.e. Consumers have space to provide additional information and/or explain their response) |  |  |  |  |  |

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| 1. **Scales** | **Yes** | **Sometimes** | **No** | **n/a** | **Comments** |
| 1. Are the scales balanced?   (i.e. There are the same number of positive and negative options to choose from) |  |  |  |  |  |
| 1. Are numerical scales clearly labelled?   (i.e. There are labels at either end and at the midpoint) |  |  |  |  |  |
| 1. Do the labels on the scale clearly link to the question?   (i.e. The response options provided allow sensible and appropriate answers to the question) |  |  |  |  |  |
| 1. Are all terms (such as frequently, sometimes) clearly defined? |  |  |  |  |  |
| 1. Where appropriate has ‘Why? Why not?’ or a ‘Comments box’ been included?   (i.e. Consumers have space to provide additional information and/or explain their response) |  |  |  |  |  |