



Designing Quality Survey Questions Workbook

A step-by-step guide for planning and drafting your survey
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Planning & Predrafting

Survey Purpose

Survey Title:

Survey Goals	
Describe the goals or intentions of the survey. What do you hope to learn or accomplish?	List the research, evaluation or broad learning questions the survey will help answer:

Note: Research, learning, or evaluation questions are broad questions that inform the questions you ask in the survey. They are rarely the same questions you ask respondents directly.

Why a survey?



Surveys may seem like the fastest, easiest way to collect information, but they are inherently imperfect and require more care and intention than we sometimes give them, especially given increasing survey fatigue. Surveys are also not the only way to collect data! Interviews, focus groups, or even observation may actually be better choices, but it all depends on your WHY - the purpose of your survey. Your broad research or learning questions should also point you toward the right data collection strategy.

Don't skip the first section of this guide – it will help you make sure that a survey is the right choice.

Why are you using a survey for this project? This is a great place to note alternatives you considered, and why, in case you need to explain this to others, or include those details in a report later.

What other data do you already have, or might you need to collect--in addition to this survey--to answer your research or learning questions? Describe here, noting the important connections to keep in mind as you develop this survey:

Understanding Respondents

Who do you hope will respond to your survey? Are you sending it to an entire group, or to a sample from a population?

What else do you know about your desired respondents?

What might they care most about, with regard to your survey topic?

When or how might they be most receptive to responding?

What might make them feel compelled to complete your survey?

What language(s) (or reading level) do you need to use to ensure the survey is understandable to your respondents?

What other considerations do you need to make in designing a survey that works for your respondents?



Design Thinking for Surveys

The survey design process benefits from design thinking – both the process and the mindset. The phases of design thinking are 1: empathize, 2: understand, 3: brainstorm, 4: prototype, 5: test. Through these phases designers aim to deeply understand users and their experiences to inform design of a 'product'. By applying design thinking in survey design, our surveys are more 'respondent centered' and therefore more engaging and useful to both respondents and ourselves.

Logistics - Roles & Responsibilities

Document who will be responsible for various aspects of the survey project below.

Task	Who is responsible?
Draft survey	
Review drafts & provide feedback	
Incorporate feedback and finalize survey	
Administer survey & monitor responses	
Communicate with respondents	
Analyze responses	
Ensure results are shared	

Developing Survey Questions



What surveys can measure

Surveys can measure: attributes (e.g., demographic characteristics), behaviors (e.g., what or how often people do something), abilities (including knowledge and skills), and thoughts (e.g., attitudes, beliefs). Information captured by surveys is considered 'self-reported' - this means that we are asking and trusting respondents to report things to us accurately, to the best of their ability.

Sourcing Questions

Are there existing questions or surveys you want to incorporate into your survey? If so, identify those here, along with any limitations or considerations that will help you draft your survey. Be sure you have permission to use any existing surveys or questions developed by others.

Brainstorming Questions

Start to list the topics you want to ask about in your survey here, without worrying about writing perfect questions just yet. This will help you get some rough ideas onto the page first.

Drafting Questions

Use this page to start drafting key questions for your survey, referring to the Designing Quality Survey Question Checklist as you go.



As you draft questions, consider:

How does each survey question (or set of questions) serve the survey's purpose or goals? How does it align with the big research, evaluation or learning questions you are trying to answer?

Is this question easy for a respondent to understand? To answer? Is it free of jargon, using plain, familiar language?

Are you minimizing burden on the respondent? Are you using the simplest possible format? Are your response options complete and ordered appropriately? Are you asking ONLY questions you really need to ask?

Finalizing

Pretesting

Pretesting is an important stage of survey design - it helps us ensure that our survey is understandable to our desired respondents and to anticipate how we will use survey responses. Be sure to include ample time for pretesting in your survey design timeline!

How will you pretest your draft survey?

- ☐ Survey quality assessment tools (like the DQSQ Checklist published in *Designing Quality Survey Questions*)
- ☐ Expert review
- ☐ Cognitive interviewing
- ☐ Focus groups
- ☐ Pilot testing



Pilot Testing

Pilot testing is one of the most common ways that surveys are pre-tested before finalization. The purpose for pilot testing can vary, and it can be quite informal or highly involved, depending on your needs. Pilots testing can help you refine survey instructions or question language, to determine preferences related to question phrasing, order, or format, and identify needs related to the survey process.

Ideally, pilot testing includes sending a draft of the survey to a small but strategic sample of potential respondents, asking them to complete it in the same format and process you will use for the full survey. You may also ask them to answer a few questions about their experience taking the survey, and solicit their feedback on the survey overall and/or specific questions.

You may also need additional folks to review your survey draft more informally, or to get approvals from leaders before it is finalized. Use this space to note else who should or must review your draft, and when they will do so:

Administration Planning

How will you administer your survey?

- ☐ Paper
- ☐ Web-based tool: _____
- ☐ Combination
- ☐ Other

What usability or accessibility considerations do you need to make? (e.g., vision aids, reading comprehension, language translation)

What confidentiality or anonymity commitments will you make? How will those be communicated? (Be sure to understand the difference between confidentiality and anonymity!)

How will you send your initial survey invitation? (Who will send it, when and how?)

How often and how will you send reminders?

What incentives will you offer respondents to encourage them to complete the survey?

- ☐ I will pre-thank them in the survey invitation
- ☐ I will communicate about how we will use the information and how their responses will bring value to them or others (e.g., in the form of future program improvements)
- ☐ I will pay them for their time and expertise. Details:
- ☐ Other:

What other communication or administration considerations do you need to plan for?

Analysis Planning

How will you analyze the survey responses?

It can be helpful to plan for analysis in detail, question-by-question and/or to describe any analysis that requires combinations of question responses (e.g., I will look at the differences between average responses to question 10 for different groups of respondents by gender, grade level, etc.). Start by brainstorming, then you can do a dry run with test responses if you pilot your survey and adjust your analysis plan as needed.

Use Planning

How will you use the information collected?

Again, it can be helpful to plan for use in detail, question-by-question, to help ensure that you aren't asking questions that you don't need, and to anticipate analysis needs. It can also be helpful to anticipate potential information scenarios by asking yourself questions like "What if respondents answer in X way? What might we do with that information?" This can be especially helpful if respondents might surprise you – if you receive answers that are not what you expected - or even oppose your assumed answers - what might you do in response?

Dissemination

How will formal reports of findings be shared?

Audience	Format	Notes

Timeline

Use this template to map out the tasks that need to be done across the length of the survey project with enough detail to help you determine the time needed, and enough time to complete all the tasks.

	Month 1	Month 2	Month 3	Month 4	Month 5	Month 6
Planning and Pre-drafting						
Developing questions						
1st draft will be complete by:						
Finalizing						
Pretesting will be complete by:						
Administration						
Reminders will go out on these dates:						
Analyzing & developing findings						
Sharing findings						

Next Steps

Document at least the next few things you need to do to keep this project moving forward below.

- ☐
- ☐
- ☐
- ☐
- ☐
- ☐
- ☐

Notes

Jot down anything else you don't want to forget here.

Content in this guide is drawn from Robinson, S. B., & Leonard, K. (2024). *Designing Quality Survey Questions*, 2nd Edition. Sage. Thousand Oaks, CA.

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