

NOAA California B-WET Program

Tool: Tips Sheet for Developing an Instrument

Note: In evaluation lingo, a survey form or set of interview questions is called an instrument or measure. Individual questions are called items.

Below are tips for drafting and finalizing the instrument you'll be using to collect data.

Tip 1. Plan it.

- Start by developing broad categories of information, then refine those into one or more specific questions (items). Ask yourself, if I get a _____ response to this item, what will that tell me? How can I use that information? How will it help us make a better decision?

Tip 2. Draft it.

- Don't edit while you draft. Start by just writing all the items that will get at the data you want.
- Then go through and edit. Make your items as brief and simple as possible. Use simple vocabulary and direct address.
- Include any help information by adding instructions or examples for difficult-to-answer items. Example: Check only one response. Or Check all that apply to you.
- Include only one thought/issue per question.
Example: Do you like ice cream? Not: Do you like ice cream and chocolate?
- Make sure response items are mutually exclusive.
Example: age 18 to 24 and 25 to 35; not 18 to 25 and 25 to 35.
- Offer an option in the responses for respondents who have no knowledge or attitudes about the subject matter. Examples: "don't know," "other," "none," "not applicable."
- Use contingency questions (or filter questions): questions that are asked based on the response to a prior question. Example: If you answered yes to Question 1, go to Question 2. Or, If you answered no to Question 1, skip Question 3 and go to Question 4.
- Don't bias responses by hinting at the desired response. Example: Wouldn't it be great if we continued this wonderful program?
- Don't ask questions to which you already know the answers.
- Keep your purpose in mind—the items you develop must provide you with information that you can use to make decisions. If you have any "nice to know" questions (items) that don't relate to decision-making, don't include them.

Tip 3. Sequence it.

Most instruments follow this format: Introduction, Instructions, Item Sequence, Other Info.

Introduction

- Establish a rapport immediately. Ask the respondent for assistance by telling them how you will use the information they provide you.
- State the amount of time required to complete the instrument.
- Provide an incentive (if possible) for completion—not necessarily a bribe, but to help respondents realize the importance of the information to you and to provide some benefit to the respondent.

Instructions

- Use clear, concise instructions on how to complete the instrument.
- Specify what to do with the completed instrument including an address or contact person to send it to.
- Give a deadline to increase return rate of mail / voluntary surveys.

Items Sequence

- Begin with a few non-threatening, easy to answer (icebreaker) questions.
- Save the least significant items for the end.
- Place the important items early in the middle before respondents tire.
- For most surveys include sensitive questions, such as income or education or ethnicity toward the end.

Other

- Include identifying information on each page (page #)
- Include identifying information on each survey (date, interviewer, project, etc.).

Tip 4. Edit and Format it.

- When you're sure you have all of your items and instructions together, read through again and edit for readability, and to find any typographic or grammatical errors.
- Layout the survey so that it's attractive (white space, readable fonts and other techniques to make it look approachable and not overwhelming).
- Take a look at the length (number of pages). Make your survey the shortest you can (for the respondents), while still getting the information you need.

Tip 5. Test it!

- Pilot test with peers, advisors and actual respondents to find problems with understandability or readability and to make sure you're getting the type of responses you expect from each item.

Tip 6. Finalize and produce it.

- Revise based on your pilot test, then proofread again. Have someone else proofread it too.
- Use professional production methods (clean, clear copies).
- Print instruments on only one side of the paper if possible. This may seem like a waste of paper, but respondents are less likely to skip a sheet of items if they're all printed on one side.