Survey 101: Basics for Survey Research

Five Basic Steps of Survey Research

1. Development of Proposal
2. Instrument Development and Survey Design
3. Data Collection
4. Post-collection Processing
5. Analysis and Dissemination

1. Development of Proposal

Goal: identify a need for survey data and obtain funding for data collection

Key tasks:
- Define questions to be answered by the survey
- Review existing data and literature
    - Make sure that research questions can't be answered with other data sources
- Outline survey instrument
- Outline desired tables, figures and charts of interest
- Set rough timetable for survey operations and analysis
- Write grant proposal or budget request
- Obtain funding

Deliverables:
- Grant proposal or budget request
- Rough questionnaire outline
- Rough outline of desired tables, figures and charts
- Rough timetable

2. Instrument Development and Design

Goal: Develop survey tools to meet the objectives, given time and cost parameters

Key tasks:
- Develop Request for Proposals (RFP) for survey vendor bids
- Finalize survey timetable
- Develop sampling procedures
- Develop weighting scheme
- Create and edit test survey instrument
- Develop interviewer training materials

-Conduct field test of survey
-Evaluate and revise test instrument based on the filed test
-Develop final instrument
-Work out a plan for analyzing the survey data
-Develop specifications for contract with survey vendor

Deliverables:
-RFP
-Sample
-Weighting scheme
-Final instrument
-Interviewer training materials
-Analysis plan
-Survey vendor contract

3. Data Collection (done by survey vendor)

Goal: Gather raw data in a timely and cost-effective manner

Key Tasks:
-Conduct training
-Field the survey
-Data capture
-Monitoring interviewers
-Communication between vendor and sponsor to resolve operational I
 issues

Deliverables:
-Tracking report of problems encountered in the field
-Progress/Status reports
-Raw data set

4. Post-collection Processing

Goal: Generate accurate and organized final data set

Key Tasks:
-Clean the data
-Edit the data
-Missing data imputation
-Weighting
-Generate data dictionary and code book
-Contains data set description, variable names, and basic tabulations
-Write a data users guide

Deliverables:
-Data dictionary and code book
-Processing specifications

　　　　-A Clean, edited, weighted and imputed data set
　　　　-Data users guide

5. Analysis and Dissemination

Goal: Translate data into useful information that answers research questions and distribute it

Key Tasks:
　　　-Create data tabulations
　　　-Write publications/reports
　　　-Make data available in "public use" form (optional)
　　　-Make sure confidentiality of respondents remains intact
　　　-Compile produce final data set documentation
　　　-Evaluate the entire process

Deliverables:
　　　-Create tables for reports
　　　-Create technical documentation/report appendix
　　　-Press releases
　　　-Public use file (optional)
　　　-Final data set documentation
　　　-Final evaluation of the survey process