



Institutional Research Survey Guide

This is a general guide to developing and administering surveys at Brown. The timeline outlined in this document is the ideal scenario for a well-designed and successful project. We understand that this timeline is not always possible. However, if you would like the Office of Institutional Research (OIR) to administer your survey on your behalf, the time for final draft, distribution and communication are firm.

Additionally, if OIR is administering the survey and any changes (to survey instrument, emails, or population panel) are requested less than 2 weeks prior to the launch, the survey launch will be delayed by a week.

Planning

6 months

- ☐ Contact "OIR @ brown.edu" to determine if a survey is the best course of action. We may already have the data you need.
- ☐ Determine the survey audience (e.g., all students or a subset of students), and the survey goals and objectives.
- ☐ Get sponsorship from the appropriate dean(s) and/or vice president(s).
- ☐ Review [Brown's Student Survey Policy](#) and consult the [survey calendar](#) to avoid overlap with pre-existing surveys.
- ☐ Consider the scope and timeline of the project, including the additional time required for compiling results. If you request that OIR provide basic analysis of your survey (population frequencies and/or means), please plan at least 3 weeks turnaround after your survey ends. Additional analyses (i.e., by demographic groups) will require additional time.
- ☐ Complete the [Survey Description Form](#).
- ☐ Start to craft your survey. This may consist of focus groups or meetings, making a list of topics and potential questions, or drafting survey questions and scales. Imagining the contents of a final report is helpful in designing the survey and ensuring that you include only questions that will be needed to inform your goals and objectives. Ultimately, this will produce the first draft of the survey.

First Draft

3 months

- ☐ If you are administering the survey yourself, build the first draft in Qualtrics.
- ☐ If OIR is administering the survey, please send the first draft to us for development. Depending on the length and/or complexity of the survey, we will have a preview available for you in 1-2 weeks.

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- ☐ The first draft should include any introductory language about the survey project, intended items and scales, and, if applicable, notes regarding survey skip or display logic (i.e., who will see certain questions).
- ☐ If the survey needs to be administered in multiple languages, consider having the first draft prepared 4-5 months early to ensure time for proper translations.

Review & Testing

2 months

- ☐ Start reviewing the first draft in Qualtrics with appropriate audiences. During review, keep one document with all the comments and changes requested by the working group.
- ☐ If OIR is administering, we will revise the first draft and return it to you. If further revisions are needed, follow the same process.
- ☐ These revisions should consider typographical errors, grammar, wording of questions, response options, number of questions, content of questions, breadth and depth of questions, relevance and validity of questions, etc.

1½ months

- ☐ Have several people test your survey. Testing involves both thoroughly reviewing the questions/response options for correctness as well as ensuring that the survey is functioning as you would like (e.g., branching, question displays, etc.).
- ☐ If OIR is administering the survey, we can help you with this step.

Final Draft

1 month

- ☐ Final version of survey, including all edits from reviews/testing, and translations (e.g., Spanish, Portuguese) should be made in Qualtrics.
- ☐ If OIR is administering the survey, the final version must be returned to OIR 1 month prior to your selected launch date. We will edit and return to you for sign off within 5 business days. We ask that you then review and sign off within the next 5 business days.
- ☐ Once OIR has returned the final version of the survey and sign off is complete, **any further changes made to the survey at this point will delay the launch date by a week.**

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Distribution & Communication

1 month

- ☐ Establish your distribution panel.
- ☐ If OIR is administering the survey, send us your distribution file or population parameters 1 month prior to launch. In the case of the former, we need First Name, Last Name, and Email (3 columns) at a minimum. In the case of the latter, we will create the survey panel using your parameters.

3 weeks

- ☐ Finalize your communications plan - text of all emails and dates for distribution. Consider the time needed to obtain any necessary messaging approvals (e.g., President's Office, University Communications, etc.).
- ☐ If OIR is administering the survey, we will have provided you with email templates for this purpose. You must fill out all portions of the template and return to us 3 weeks prior to launch.