

# Writing Strong Staff and Family Surveys: Best practices, field examples, and guided application

June 10, 2025  
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## About Us

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## Why would you do a survey?

- Gather staff, family feedback on program operations, services
- Gather data before and after implementation of CQI projects to measure improvements
- Surveys are thought of as being relatively quick and easy to do. But writing good surveys takes significant practice, and the survey itself may need to evolve as program needs change...

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## Presentation Overview

- How do you write a good survey?
- How do you make surveys more accessible?
- How do you implement and distribute a survey?
- Let's practice: breakout groups create their own surveys
- Questions

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## Base Assumptions & Key Reminders

Assume your respondent is:

- Not stupid, but not a genius
- Probably wants to “please you,” give desirable responses
- Busy, and has other things they could be doing with their time. Can drop out/quit at any time
- Minimally motivated to help you.

So:

- Keep it simple, but not insultingly so
- Ensure neutral, unbiased, unthreatening language in all questions
- Make your survey as short as possible! Make answering /continuing *easy* for them
- Provide internal, external motivations.

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## Step One: Know what you need to know

- What are your key questions? What are the key pieces of information you need to collect to answer those questions?
  - Every item should have a point (info you need to get out of it) and you should have a plan for how you will use every item.
- If you don't need it: Don't ask it!

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## Question Development: Common Survey Issues and Solutions

### Ask yourself:

How could this question be answered in a way I *don't* want? How could this item be misinterpreted? How can I make the question clearer to guard against likely misinterpretations?

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## Question Development

- Mismatched questions and response items:
  - Did HF help you receive the services you needed?
  - Strongly disagree; Disagree; Neither; Agree; Strongly Agree
- Make sure questions and items match, are comprehensive
  - Did HF help you receive the services you needed?
  - Yes, helped receive; No, did not help receive; Still working with HF

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## Question Development

- Double-barreled questions:
  - Was your HF staffer friendly and helpful?
  - Yes; No
- Ask separately!
  - Was your HF staffer friendly?
  - Was your HF staffer helpful?

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## Question Development

- Asymmetrical scales:
  - Overall, how helpful were the HF staff with whom you worked?
  - Super helpful, Very helpful, Somewhat helpful, Not helpful
- Include same number of positive & negative options
  - Overall, how helpful were the HF staff with whom you worked?
  - Very helpful, Somewhat helpful, Neither helpful nor unhelpful, Somewhat unhelpful, Very unhelpful

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## Question Development

- Overlapping scales:
  - What is your age?
  - 20 or younger; 20-30; 30-40; 40-50; 50 or older
- Don't overlap response categories
  - What is your age?
  - Less than 20, 20-29; 30-39; 40-49; 50 or older

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## Question Development

- Non-exhaustive response options:
  - On average, how often did you have visits from HF?
  - Once a month; Once a week; Once a day
- Use ranges, and/or make sure to include "other, specify"
  - Over the last 6 months, about how often did you have home visits from HF?
  - Once a month *or less*; A few times a month; Once a week; A few times a week; Almost every day *or more*
  - Over the last 6 months, about how many times did you have a HF home visit?
  - 1-2 times; 3-5 times; 6-10 times; Other, please specify:

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## Question Development

- Reference Periods:
- Greater accuracy with shorter (more recent) reference period
  - How often did you have home visits from HF in the past **6 months**?  
[0-5 times, 6-10 times, more than 10 times]
  - How often did you have home visits from HF in the past **month**?  
[1-2 times, 3-5 times, more than 5 times]
- Or consider: using “landmark” event (**since your child’s birth, first birthday?**)
- **But:** items with lower base rates may require longer period
  - Have you ever spanked your child(ren)? *If yes:*
  - About how many times have you **ever** spanked your child(ren)?
  - About how many times did you spank your child(ren) **in the past year?/month?**

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## Question Development: Framing & Language

- Social desirability: *We are conducting this survey as part of a program to reduce drinking in excess. Please answer these items according to your drinking habits.*
- Clear valences: *X program has been implemented to improve services. Please respond according to your experience with services.*
- Links to authority: *<Relevant authority figure> supports X plan. Please answer the following items on your opinions of this plan.*
- Comments about sensitivity of topic: *The next questions ask about experiences of domestic violence or abuse. I know this topic might be sensitive. Please just give your best answer, if you can.*

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## Question Development: Framing

- Instead... use your Motivational Interviewing skills!
  - Keep question intros and transitions to a minimum. Be brief, balanced, bland:
    - The following questions ask about your drinking habits. Please answer according to your habits.
  - Or, use to lower threat level for sensitive topics (normalize).
    - Feeling unsafe at home can happen to anyone. Have you ever felt unsafe at home or with a partner?
    - Even the calmest parents get angry at their children some of the time. How often did you get angry with your children in the past week?
    - *(Also allow respondents to skip an item if they want! Rate of missingness/skips can be an interesting data point...)*

Bradburn, Sudman, & Wansink. (2004) Asking Questions: the definitive guide to questionnaire design – For market research, political polls, and social health questionnaires, revised edition. Jossey-Bass, San Francisco, CA. 15

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## Question Development: Framing & Language

What's the difference between these questions? How might they result in different answers?

- How has your life improved because of your participation in HF?
- How has your life changed because of your participation in HF?
- Has your life changed because of your participation in HF? If so, please tell us how.
- Tell us about your experience with HF.

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## Question Development

- Otherwise: Make items as easy as possible for respondent to answer
  - Avoid technical jargon, abbreviations
  - Avoid double negatives

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## Question Development Summary

- Make sure questions and items match, are comprehensive
- Avoid double-barreled questions: ask each piece separately
- Use symmetrical scales (same number of pos & neg options)
- Avoid overlapping response categories
- Have exhaustive response options: Use ranges, and/or make sure to include “other, specify”
- Select appropriate reference periods (more recent and shorter = more accurate; use “landmark” event; items with low base rates require longer)
- Item framing: “neutral-positive” introduction, unbiased wordings; lower threat levels of items through normalization
- Use simple language: avoid jargon, abbreviations, double-negatives

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## Improve This Item!

Assume this is from a participant satisfaction survey:

- How great was your HF worker?

*Strongly agree, Agree, Neither, Disagree, Strongly Disagree*

- Please mark how strongly you agree with the following statements.  
Your responses will help us improve services for future clients:

- My home visitor respected my cultural, ethnic, and religious needs.
- My home visitor responded to my concerns appropriately.
- My home visitor shared resources that met my needs.

*Strongly agree, Agree, Neither, Disagree, Strongly Disagree*

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## Improving Responses to Text Entry Items

- Open-Ended Items: Free response, text entry
  - Always tough, but especially tricky on smartphones!
  - And harder to analyze, especially if more recoding is needed!
- What should you do?
  - Minimize number of open-ends
  - Reserve for end of survey
  - Allow respondents to skip
  - Add motivating text to question: *why should I bother answering?*
  - Make sure open-ended data is useable (and requires little recoding from you)! Avoid invalid answers:
    - Use built-in validation (e.g., expecting numbers?)
    - Provide example, especially on formatting

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## Improving Responses to Open-Ends: Examples

- When was your first HF home visit?
  - Year? Exact date? 2023 vs. 23 vs. June 2023 vs. 6/2023 vs. 6/23?
- Please provide the approximate month and year in which you first started working with HF (e.g., 6/2023):
- Please describe how HF staff were helpful or unhelpful.
- How satisfied were you with the support provided by HF staff?  
*Very satisfied; Somewhat satisfied; Neither satisfied nor dissatisfied; Somewhat dissatisfied; Very dissatisfied*
- You indicated that you were somewhat dissatisfied with the support provided. Can you tell us more about this? *Your answer will help us adjust our services better for future clients.*

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## Survey Design Choices: Question Order

- Open with informational or consent language that quickly and clearly explains the topic and purpose of the survey (and hopefully is motivating to continue!).
- Respect respondents' time by doing screening items next, if any.
- The first items after screening should have high relevance, be interesting, easy to answer, applicable to everyone, and not open ended!
- Keep open-ended items toward the end

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## Survey Design Choices: Question Order

- If the survey is asking about multiple things: Group items with similar concepts, items with similar response scales together
  - Group all your satisfaction questions, Group all your 5-point Likerts
  - Try to use simple, consistent response scales where you can (make everything a 5-point agree-disagree? A Yes/Sometimes/No?)
- Ask general question first, then specific
  - How satisfied were you at your last HF visit?
  - How satisfied were you with HF overall?
  - How satisfied were you with HF overall?
  - How satisfied were you at your last HF visit?
- Keep more intense items to the end! Ease respondents into the heavy stuff.

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## Survey Design Choices: Forcing Responses

- If you're doing an online survey:
  - Requiring responses -> drop out, lower-quality data
  - But high number of skips may invalidate data
- *Consider:*
  - What items do you need for participant filtering/screening?
  - What items are critical for your question/analysis?
  - When is skipping reasonable? What might respondents plausibly not want to answer? Is Don't Know a reasonable response?
  - Can you remind participants to respond, but not force/require?

Decieux et al. (2015) Implementation of the forced answering option within online surveys: Do higher item response rates come at the expense of participation and answer quality? *Psihologija*, 48(4), 311-326.

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## Survey Accessibility

- Who can access your survey? Who is capable of providing feedback via this method?
- Considerations:
  - Literacy level
  - Languages spoken
  - Cognitive capacity (ID/DD participants)
  - Access to technology to respond

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## Improve This Item!

- How frequently has your home visitor helped you obtain access to concrete services?
- How often has your home visitor helped you get items or services you need (such as diapers or food pantry supplies)?
  - + *translations*

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## Another Option: Photovoice

- Since “a picture is worth 1000 words”:
- Ask respondents to submit a few pictures that represent their experience with program, worker, services, or one picture per specific prompt?
- **Benefits:** Collectively, can be very powerful. Requires limited reading, language fluency. Allows respondents self-expression
- **Challenges:** Requires access to smartphone. Requires more interpretation of results: some pictures might be more abstract. Photos may be identifying, include children’s faces, so need to be careful about distribution (or instructions)

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## Survey Accessibility

- What are other challenges with accessibility?
- What are other strategies you use to increase accessibility?

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## Presentation Overview

- How do you write a good survey?
- How do you make surveys more accessible?
- **How do you implement and distribute a survey?**
- Let's practice: Group review and revision of sample surveys
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## Options for Survey Distribution

- In-Person paper survey: Bring to visits, leave in program office...
- Mail out paper survey: Mail to former program participants
- Call people and ask items over the phone
- Email link to online survey: Send individual links, or general-use ("anonymous") link
- Put survey link on a flyer
- Put a QR code on a flyer, stickers, etc.
- Post link on social media
- Text link to online survey
- Text back-and-forth survey questions

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## Online Survey Options

- Qualtrics
- SurveyMonkey
- Google Forms
- What else have you used?
- What are the benefits, challenges of each?

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## Online vs Mobile Surveys

- Assume *all* online/emailed surveys are “mobile surveys,” too
  - 81% of Americans own a smartphone
  - 17% have smartphone only: *no home broadband internet*
    - Particularly younger, non-white, lower income, lower education
- So, assume that your online surveys will be taken on smartphones, and optimize for that, too!
  - Especially if distributing by flyers with links/QR codes

Pew Research Center, data through winter 2019 <https://www.pewinternet.org/fact-sheet/mobile/>

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## Mobile Survey Optimization

- Is “Mobile Friendly” an option on your platform? Is there a “Mobile Preview”?
- Minimize scrolling: especially side
- Minimize open-ends
- Check images: Are large images scaled correctly?

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- **Wording Considerations:**
  - What wording, language will be meaningful to your respondent population? What is too "jargony" or *insider-y*? How will they identify themselves? What will feel *scammy*?
  - How much information about the survey's topic, purpose should you give on the flyer? What will allow potential participants to realize that the survey applies to them, and what is better to screen for later? (e.g., people who are eligible for a service but do not use it might not respond if a flyer says it is about need related to that service, because they don't think of themselves as eligible/users; probably don't put income thresholds required on flyer)
  - Is your survey/focus group available in multiple languages? If yes: do you want to note the languages on the flyer, or design a different flyer for each target language?
  - Make your call to action clear: Do you want people to take your survey, sign up for your focus group, contact you for more information?
  - Consent-y language to include: anonymity/confidentiality? Duration of participation? Incentives available (and any limits: e.g., first 250 participants will receive \$5 digital gift card to X store)?
  - Include an end date on participation! Respond by X date, Survey open until Y date, etc.
- **Design Considerations:**
  - Google image search for graphics based on target population, survey topic, data collection method... whatever you can think of! Then refine, adjust search as needed
  - Consider: stock photos of people (if particular target population, age group, gender, race, etc.: make sure you're including appropriate diversity) versus illustration (potentially more universal, especially if a silhouette/outline, but also less specific).
  - Consider icons: insert in PowerPoint, or find through <https://thenounproject.com/>
  - Slide background: semi-transparent image? Solid color, or color gradient? Or white, if already a lot of visual stuff going on!
  - Logos: Whose should be included? CHSR's? (look in Templates folder on G drive) Sponsor? Funder? What will bring participants in, versus turn them off? Negotiate with sponsor
  - Color schemes: pull from funder logo? from CHSR logo? from an image?
  - Font choices: what is the right balance between interesting and easily readable?
- **Distribution Considerations:**
  - Include a QR code on flyer
  - Make urls into tinyurls (<https://tinyurl.com/app>) or bitlys (<https://bitly.com/>): avoid Qualtrics' awful keysmash urls. Test to make sure urls are clickable on final pdf!
  - Include a phone number for follow-up contact? Especially if a non-tech-savvy audience
  - Distribute as a pdf, not an editable ppt file or a .psd (not enough people will be able to open) or .jpg/png/tif (will feel scammy)
  - Will the flyer also be printed and hung on a bulletin board, handed out? Will distributors have access to color printers? Should we print and send physical copies to program offices?

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**Are you pregnant or living with a child under the age of 5?**

*If so: We want to hear from you!*

The first 250 participants will receive a **\$5 digital gift card** to Walmart or Amazon



Scan the QR code, or enter this link to answer a few questions:  
<https://tinyurl.com/NYParentSurvey>

- ✓ The questions will take about 5 minutes to complete
- ✓ Responses are anonymous
- ✓ The questions are available in English, Spanish, and Chinese

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9/2022, Funded by NYSDOH and USDA/FNS.

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## Strategies for Engagement

- Options include:
  - Money: is a \$5 gift card an option? Or a \$5 gift card for first 50 respondents?
  - Social reward (“your responses will help us improve the program for future clients”, you feel like a good person for helping us out)
  - Making survey completion part of something else that’s already happening (during a visit?)
  - Making responses really feel anonymous, confidential
- What have you found to be effective strategies?

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## Activity Time!

- At your table collectively select a survey topic from the list provided. Collaboratively develop questions/a draft survey related to the selected topic.

Questions to consider:

- How do you introduce your survey? What will motivate folks to take it, respond?
- What are the key concepts you need to ask about? How can you ask them to get the best and most actionable information?
- How do you distribute the survey? What method(s) do you believe will be effective?

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## Your Surveys

- Anyone want to share their survey or some survey questions?
- Did anything stand out during this process?
- What seemed to be the most important takeaway during this process?
- What challenges, if any, did you encounter? How did you work through these challenges?

### Optional: Self Reflection

- What was your role in the learning process today? Were you active or passive in the survey development?

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## Final Questions?



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# THANK YOU

## Contact Us

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