



10 Steps to Building a Successful Survey

1

Determine the goal and purpose of your survey.

It is crucial to begin with the end in mind. Design your survey by asking yourself, “What do I want to learn from the survey data?” or “What is the story of impact I want this survey to help me tell?” This will also help you share why the survey matters when you introduce it to participants.

2

Create different surveys for different stakeholders.

Based on the goals you define, you may realize there are different things you want to learn from different stakeholders you engage with (ex. program participants, program alumni, donors, volunteers, etc.). While many of the questions you ask might be the same or similar, in some cases it can be more effective to create a separate survey for each stakeholder group.

3

Consider how often you do surveys.

Survey frequency should match the goals of the survey. If your goal is to better serve new program participants, then look to include survey questions as part of the program’s registration or enrollment process. If your goal is to track changes over time, you should consider doing pre- and post-surveys. You might also consider linking surveys to key milestones or activities.

4

Collect identifiable data if you plan to sync with other data sources.

To connect your survey data with other data sources, you need to collect the same unique identifier as part of each survey and/or data source. Popular unique identifiers used for linking different data sources include asking participants for their *First Name*, *Last Name*, and *Date of Birth* because these can be combined into a unique identifier; or site name for programs.

5

Choose selection fields rather than open text fields when possible.

Selection fields -- such as multiple choice questions and dropdown menus -- ensure that survey responses are collected in a consistent format that maximizes the data’s opportunities for analysis. And you can always include an “Other” option with an open text field for participants to describe aspects of their identity in their own words if they’d prefer.

6

Include questions that can help you leverage publicly available data.

Asking participants for their home zip code, city, and/or county creates the opportunity to compare the demographics of your participants to the overall demographics of the communities they come from. This can support your ability to highlight the access and equity impacts of your work.

7

Limit survey length to increase the quality and quantity of responses.

Surveys as short as 3 or 4 questions can be really powerful, in part because their brevity makes them easier to use. With this in mind, don’t ask program participants for information you already have about them, beyond what is needed for identifying and matching them to other data.

8

Review survey question wording to be as clear and concise as possible.

Prioritizing the survey respondent’s experience is one of the best ways to ensure high-quality survey data. As you read over each survey question, make sure it will be understood by the intended audience -- especially if the survey is for young children or English Language Learners.

9

Schedule survey time and follow up with people to increase total survey responses.

Set aside program time for participants to fill out surveys and/or make it part of registration. Rather than being something to “get out of the way,” a well-designed survey should prompt participants to be reflective at important phases of their program journey. One or two weeks after launching a survey, a quick reminder note is often all it takes to get back on people’s radar.

10

Analyze survey data so that you can learn and take action.

Once you have collected all of the survey responses, the next step is to analyze that data so you can start to learn from it to inform decision making, resource allocation, and fundraising. People will likely feel that the time they spent filling out or collecting surveys was worth it when they see survey data being put to work.