

## **Instrument Development Checklist Guidelines for Selecting or Creating Survey Items and Designing Surveys**

### **A. Organizational Survey Systems.**

Ideally, all survey data collection efforts in an organization will use a common approach. When this is done, an organization can expect the following advantages:

1. Users can learn a single reliable data collection methodology.
2. Some data may already be available and thus eliminate the need for collection.
3. The number of instruments can be reduced thus saving cost and time.
5. A single set of demographics will allow tracking across data collection efforts.

### **B. Creating Demographics.**

Whenever possible, create a common set of demographics for all potential data collection efforts. This will save time and permit viewing data more readily between survey results. See the *CapacityWare*<sup>TM</sup> Administrators Manual (Tab 2, page 4) for demographic suggestions.

### **C. Establishing and Tracking Common Survey Items.**

Whenever possible, it is valuable to establish and track common survey item results by embedding one or more of these items in all data collection efforts. This will permit users to correlate results using an exacting metric that will help gauge both item validity and results reliability. *QWLC* maintains a list of 25 common items used in quality of work life surveys as a consistent metric. Each organization is encouraged to establish a similar common item pool.

### **D. Each Item as a Positive Statement.**

*QWLC* uses a technique that offers a statement and asks the respondent to Strongly Agree "9", Strongly Disagree "0", or select a number between 0 and 9 that represents the level of agreement/disagreement. The standard Likert scale template is modified to visually denote three clusters - 7 8 9 are in the higher, or Agreement end of the scale; while 0 1 2 are in the lower, or Disagreement end of the scale. The cluster 3 4 5 6 are in the center cluster without any number representing the mid-point. An opportunity to non-respond will always be available.

The statements are all positive in tone and come to represent an internal vision for how employees want the organization to be.

## **E. The Universal Scale.**

The zero to nine scale presents ten options in three distinct groups:

The Disagree set consisting of “0 1 2”

- 0 = Totally Disagree – always and entirely
- 1 = Usually Disagree less than 50% of the time, but not always or entirely
- 2 = Often Disagree more then 50% of the time, but not always or entirely

The Neither Disagree or Agree set consisting of “3 4 5 6”, and

- 3 = Leaning toward Disagree, but have some reservations
- 4 = Nearly Neutral but slightly Disagree
- 5 = Nearly Neutral but slightly Agree
- 6 = Learning toward Agree, but have some reservations

The Agree set consisting of “7 8 9.”

- 7 = Often Agree less than 50% of the time, but not always or entirely
- 8 = Usually Agree more then 50% of the time, but not always or entirely
- 9 = Totally Agree – always and entirely

A “No Response” option is also available but it is suggested that his option be used sparingly. If “No Response” is used, it will be helpful if a comment is also provided that would explain this selection. For example, “Don’t know” – “Haven’t observed” – “Infrequent interaction” are all legitimate reasons for selecting “No Response” and will help considerably in understanding the rationale for using this option.

## **F. Using the Item Pools.**

Item Pools have been developed over a 20-year period. The original set of potential items contained approximately 100 items. The Pools have grown to over 1,000 by adding items that were important to clients over the years.

We expect that items using generic terms, such as "organization, or "work group" will be more clearly defined by the Data Collection Team as the survey evolves.

It is NOT essential to select items from the Pools. Separate items can be effectively created using the guidelines below.

## G. Survey Item Creation

Include a minimum of 2 items from each UHS category whenever possible.

Include items that focus on issues about which we can do something. State mandates, Federal regulations, etc. may mean an issue is “beyond our control” to resolve.

Select items that will elicit a response of some kind (rather than a “N”) from *most* respondents.

Keep items focused – avoid compound statements using “and”.

State items positively, so “9” is the most positive response (I agree), “0” is the most negative (I disagree).

Avoid ambiguity – use consistent labels, i.e. Leadership, Management, Supervisor, etc. Be specific.

Use language that is familiar with your system – generic items may need to be modified to “fit.”

Always include at least one open-ended question at the end of the survey.

## H. Characteristics of Good Items.

Here are some rules to follow in selecting or creating survey items.

### **Do...**

- Use simple words and simple (not compound) sentences.
- Keep items short.
- Use clear terms with one or few meanings.
- Use language that is common among the respondents.

### **Don't...**

- Use double-barreled items.
- Use double-negative items.
- Use uncommon or exotic terms.
- Use words or phrases that lack precision.
- Use items that are beyond the knowledge level of the respondent pool.
- Use "loaded" or "witch hunt" items to advance a narrow agenda.
- Use items that contain alternatives.

Check the reading levels of all items and keep the level at or below 8th grade when possible.

## I. Narrative Comments In-line with Items.

Space must be provided so that respondents can provide narrative immediately following any or all items if comments are truly expected. *QWLC*, in collaboration with client desires, may edit comments or withhold comments.

The narrative comment option with each item can also be used to collect specific information such as a name and address, etc.

## J. Creating Open-ended Questions.

From one to five open-ended questions can be inserted at the end of the survey so that respondents can provide any information on a variety of topics.

## K. Final Review.

The Data Collection Team is responsible for addressing the issue of "probability of response." A high level of confidence must exist that all potential respondents will know (or ought to know) how to respond to each item. Although receiving a high number of non-responses may cause an item to be turned off, this is not desirable.

### The Checklist

Items are framed as a positive statement.	Yes	No
Items are lifted from the Item Pool without altering the category.	Yes	No
Items are created using acceptably consistent criteria.	Yes	No
Items use organization's labels.	Yes	No
Items do not include "and", "or", "always" or "never."	Yes	No
Items embody positive characteristics.	Yes	No
Comments are inviting of relevant issues.	Yes	No
A pilot group rated the items positively.	Yes	No