Survey Evaluation and Pilot Testing

Department of Political Science and Government
Aarhus University

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1 Small Groups

2 Survey Evaluation

3 Activity I

4 Activity II

5 Preview of Next Time

Schedule for remainder of course

- Schedule
  - Week 46: Interviewing
  - Week 47: Recruitment
  - Week 48: Data management
  - Week 49: No class!
  - Weeks 50–51: Presentations
- Available Dec. 4–5 for meetings
- Exams are due in January

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Small Group Discussions

- Discuss:
  - Your questionnaire
  - Mode for your project
- Report back any issues you encountered and common themes in your conversations

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What is survey evaluation?

- Systematic testing of a survey instrument prior to data collection

Why pilot test?

Why pilot test?

- Want to collect accurate, high-quality data
- Survey design is challenging to get right
- Surveys are expensive
- We may not be knowledgeable about the survey topic or population

What can we learn from evaluation?

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- Determine how to ask questions
- Determine how *not* to ask questions
- Identify confusing questions or answer options
- Identify patterns of bias
- Identify sensitive items
- Identify context effects
- Identify mode effects
- Estimate survey duration
- Estimate and improve nonresponse & refusal rates

Methods of evaluation

- Informal discussion
- Expert and/or peer review
- Small-*n* pilot tests
  - Record checking
  - Questionnaire experiments
- Focus groups
- Cognitive interviewing
- Interviewer training

Informal Discussion

- This is what we've been doing
- Good starting point
- Not systematic

Expert/peer review

- Identify subject area experts
- Ask them to review the design and instrument
- Revise based on expert feedback

Pilot tests

- Administer questionnaire to small sample
- Not necessarily random sample
- Might use sample for other types of evaluation
  - Focus group
  - Cognitive interviewing

Record checking

- Check responses from a pilot survey against administrative records
- Useful for recall-type questions

Questionnaire experiments

- Randomly assign respondents to different:
  - Individual items
  - Batteries of items
  - Entire questionnaires
  - Modes
- Compare results and use “best” methods

Focus groups

- Use before *or* after a questionnaire is drafted
- Multiple possible uses
  - Develop knowledge about subject area or population
  - Identify topics to include in survey
  - Draft question wordings
  - Clarify question and response meaning
  - Etc.

Cognitive interviewing

- Conduct mock interviews
- Instead of recording answers, record respondents':
  - Interpretations of questions and answers
  - Difficulties understanding items or topics
  - Concerns with items or topics
  - Sensitivity
  - Etc.
- Use quantitative and qualitative analyses

Interviewer Training

- Train interviewers how to conduct the interview
- Use their prior knowledge and experience from the field to update design
- We'll talk more about this next week

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Activity I: Cognitive Interviewing

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Activity II: Focus Groups

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Agenda for next class

- Discuss your survey evaluation plans
- Discuss interviewer training
- May start discussing fielding/recruitment

Assignment for next week

- Draft a plan for how to evaluate your survey
- Discuss these in small groups
- Implement at least part of that plan for the exam