IndiKit

Rapid Guide to Describing a Survey Methodology

In the relief and development sectors, the most common types of surveys are baseline and endline surveys, situational analyses and needs assessments. All of these surveys require a sound methodology to guide their implementers and ensure maximum validity and reliability of their findings. A clearly described survey methodology is also **essential for being able to precisely replicate the survey**, allowing us to gain comparable data. If you know what you want to do, how and why, describing a survey methodology does not take long and is definitely worth your time. No lengthy descriptions are needed – providing essential information in bullet points is perfectly fine for most surveys. **The description of your survey methodology should include**:

Survey Background

Describe the context of your survey, focusing on which project it is being implemented for, what are the project's target areas, intended goals, target groups and time frame. Always clarify any terminology used in the survey.

Survey Goals

Describe what exactly the purpose of the survey is – what type of information it is supposed to provide and how exactly you will use it. Justify why the survey is required.

Survey Target Population

Describe who the survey will collect the required data from. If a comparison group is required, describe and justify it here. For more information, read IndiKit's Rapid Guide to Survey Sampling.

Survey Content

Describe what the main focus of your survey is. This might be, for example, collection of data for your logframe's indicators or a set of key research questions (for which you developed more detailed sub-questions). You can categorize the questions according to the main themes or according to the survey's target groups.

Survey Timing

Describe when exactly the survey needs to take place. If required, specify when the follow-up survey needs to be done. Many data across different sectors are prone to significant seasonal variations, such as access to water, prevalence of certain diseases, levels of malnutrition, coping strategies, dietary diversity, income, demand for services or sale of certain products. If they are not collected at the same time of year, they might not be comparable. Some data can even be collected at a very specific time only (e.g. when fields are being ploughed). Explain, therefore, how you ensured that the timing of your survey does not compromise its results. Describe also how you considered the respondents' availability to participate in the survey.

Survey's Data Collection

There are a variety of options for how you conduct your survey. Always describe the following:

- *Sampling Strategy:* Describe your sample size (number of respondents), its confidence level and margin of error, and exact steps for respondent selection (including what to do when the respondent is not available). If required, describe the same for your comparison group, including how it was selected (to be comparable with your survey's target group). For more info, read IndiKit's Rapid Guide to Survey Sampling.
- *Administering Questions:* Describe whether your survey will be self-administered (i.e. the respondents fill in the questionnaire) or whether the questions will be asked (and observations made, etc.) by data collectors. Specify whether the data collectors will work alone or in pairs, with one having a role of note-taker.
- *Data Collection System:* Describe whether the data will be collected by using tablets, paper questionnaires or an on-line survey. In the case of electronic data collection, specify who will program the questionnaire.
- *Survey's Language:* Describe in which language the questionnaire will be administered and how you will ensure that the translation is correct (e.g. by doing back translation, pre-testing the questionnaires, etc.).
- *Quality Management*: Describe what exactly you will do to ensure that the data is collected and analysed to a maximum quality (for example, by using IndiKit's Quantitative Survey Checklist and supervising the data collectors by using Quality Improvement and Verification Checklist (QIVC) for Individual Interviews).

Required Resources and Logistics

However brief this section in the overall survey methodology description is, it should never be skipped. As the well-known saying goes, “the devil is in the detail”. Always describe how you will address the following:

- *Survey’s Budget:* What are the expected costs of the survey? Is the allocated budget sufficient? To make sure that you did not forget an important expense, use IndiKit’s Surveys Budgeting Checklist.
- *Detailed Work Plan*: Describe how many days each of the survey’s components will take (preparatory tasks, training of data collectors, piloting, data collection, analysis, presentation, etc.). When doing so, take advantage of IndiKit’s Quantitative Survey Checklist.
- *Human Resources:* Describe the roles and responsibilities of the survey team members. Specify how many data collectors (and other staff) you need, what competencies they should have and how you will hire them.
- *Survey’s Logistics:* Specify the required transport, equipment, accommodation, etc. including who will be responsible for the required arrangements. If you operate in an insecure environment, describe who will ensure the survey team’s safety. Take advantage of IndiKit’s Survey Logistics Checklist.

Data Processing, Analysis and Presentation

- If you use paper questionnaires, what data entry system will you use, who will prepare it and who will enter the data?
- How will the data be analysed? (e.g. by using statistical software, Excel, KoBoToolbox, etc.) Who will perform the analysis?
- How and to whom will the survey’s findings be presented?

Ethical Considerations

Describe how you will address the main ethnical concerns (related to data confidentiality, informed consent, use of comparison groups and other considerations).

Contact Details

Lastly, provide contact details of the person(s) responsible for the design and who are able to provide more detailed information (for example, to a person who will be responsible for managing a follow-up survey).

Annex I: Questionnaire

Your survey questionnaire(s) and other data collection tools (such as observation checklists, tests, etc.) should be provided as an annex to the description of your survey methodology.

When preparing a questionnaire, it is tempting to include questions because they seem interesting. However, this often results in surveys taking too much time (and money), data collectors and respondents being tired (resulting in lower data quality) and accumulating excess data which we do not actually use. Therefore, **only include the data which you really need for programming decisions and for measuring the benefits** of your project.

When **formulating specific questions**, look at them from the respondent’s perspective, keeping them as easy to understand as possible. Avoid using complex words, technical terms, jargon or phrases that are difficult to understand. Use language that is commonly used by the respondents. For example, use *work* instead of *employment*, *about* instead of *regarding*, *people who live here* instead of *occupants of the household*, etc. All questions need to be asked in a neutral, non-leading way. Each question must ask about one topic only, so that it is clear what the provided answer relates to.

The order of questions can affect the respondent’s answers. If you ask sensitive questions, include them in the final part of the questionnaire (when people might already feel more comfortable about the survey and be more open to answer the questions truthfully). When deciding on the order of the survey questions, ensure that a previously asked question doesn’t lead the respondent to answer the next question in a certain way.

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