

# Survey Planning Checklist

This checklist will help you in planning your survey assessment, from design to deployment, and through reporting. The Task column includes common activities when doing survey assessment, but some of the tasks may not apply to your assessment and/or you may need to add a few tasks to the list based on the specifics of your project.

## Keys to Success:

- Consider assigning people to the various tasks as necessary.
- Use the blank bullet points to list any tasks specific to your project.
- Print this checklist and keep it handy throughout your project.

Task	Date Planned	Person Assigned	Date Completed
<b><u>4-6 weeks before surveying</u></b>			
<ul style="list-style-type: none"> <li>• Develop Instrument</li> <li>• Edit and review the Instrument</li> <li>•</li> <li>•</li> </ul>			
<b><u>2-3 weeks before surveying</u></b>			
<ul style="list-style-type: none"> <li>• Finalized version of instrument ready</li> <li>• Submit assessment plan and draft of survey instrument to SAIRO</li> <li>• Submit project to Campus Labs Baseline (after SAIRO approval)</li> <li>• Prepare contact emails/outreach materials</li> <li>•</li> <li>•</li> </ul>			
<b><u>1 week before surveying</u></b>			
<ul style="list-style-type: none"> <li>• Preview online version of survey</li> <li>• Print survey if doing paper, create QR if mobile</li> <li>• Execute pre-survey communications/outreach</li> <li>•</li> <li>•</li> </ul>			

Task	Date Planned	Person Assigned	Date Completed
<p><b><u>Administer survey (2-4 wks if online)</u></b></p> <ul style="list-style-type: none"> <li>• Survey administered</li> <li>• Send reminders (as necessary)</li> <li>• Data entry (if paper)</li> <li>•</li> <li>•</li> </ul>			
<p><b><u>1-3 weeks following survey administration</u></b></p> <ul style="list-style-type: none"> <li>• Send out incentives</li> <li>• Data analysis</li> <li>•</li> <li>•</li> </ul>			
<p><b><u>3-5 weeks following survey administration</u></b></p> <ul style="list-style-type: none"> <li>• Reports prepared (paper, verbal, presentation)</li> <li>• Findings shared with leadership/key stakeholders</li> <li>•</li> <li>•</li> </ul>			

Notes:

*For more information, check out the following documents located at: [www.sairo.ucla.edu/AssessmentSupport.html](http://www.sairo.ucla.edu/AssessmentSupport.html)*

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| <ul style="list-style-type: none"> <li>• Planning Your Assessment</li> <li>• Worksheet for Assessment Planning</li> <li>• Writing Effective Survey Questions</li> <li>• Tips for Assessing Workshops</li> </ul> | <ul style="list-style-type: none"> <li>• Common Pitfalls to Good Survey Questions</li> <li>• Matching Survey Scales to Desired Outcomes</li> <li>• Designing Effective Surveys</li> <li>• Links to Additional Resources</li> </ul> |
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