

**Questionnaire Design
Summer Institute 2017
Tu, Th: 3-5:30pm
Perry G300**

Instructor: Jessica Broome (jsbroome@umich.edu)

TA: **TBD**

A. Objective

The objective of this course is to introduce the scientific literature on the design, testing, and evaluation of survey questionnaires. The course will also provide hands on applications of the methods discussed in class. Students will be expected to draw on the material covered in the lectures and readings in conducting a series of exercises in the development of a questionnaire.

B. Course Assignments and Requirements

Students are expected to complete:

- Informal presentation of reading highlights and question submissions (worth 20% total)
 - Presentation of reading (10% total)
 - Submitting discussion questions on reading materials and/or topics covered in class (10% total)
 - Due 8am day of class
- In-class exam (worth 20%)
- Project (40%)
 - 4 homework assignments (worth 10% each)
 - Typed, no more than 8 pages, submitted through Ctools
 - 2 presentations to the class (worth 10% each)

For all students and classes, I am looking for contributions to the class discussion that demonstrates familiarity with the readings.

C. Course policies:

Each student may turn in one assignment one week late, by informing the instructor **before** the original due date. All other late assignments will be marked down by 5% for each day the assignment is late.

Students are also expected to attend each class. Instructor should be notified in advance for planned absence such as going to conference and schedule conflicts. Each student may be excused for one absence without advance notice. Instructor will make adjustment to grade based on attendance and participation in class.

D. Accommodations for Students with Disabilities

University of Michigan

If you think you need an accommodation for a disability, please contact Services for Students with Disabilities (SSD) office to help us determine appropriate academic accommodations. SSD (734-763-3000; <http://ssd.umich.edu>) typically recommends accommodations through a Verified Individualized Services and Accommodations (VISA) form. Any information you provide is private and confidential and will be treated as such.

E. Academic Conduct

Clear definitions of the forms of academic misconduct, including cheating and plagiarism, as well as information about disciplinary sanctions for academic misconduct may be found at the Rackham web site for the University of Michigan:

http://www.rackham.umich.edu/policies/academic_policies/section10/

Knowledge of these rules is the responsibility of the student and ignorance of them does not excuse misconduct. The student is expected to be familiar with these guidelines before submitting any written work or taking any exams in this course. Lack of familiarity with these rules in no way constitutes an excuse for acts of misconduct. Charges of plagiarism and other forms of academic misconduct will be dealt with very seriously and may result in oral or written reprimands, a lower or failing grade on the assignment, a lower or failing grade for the course, suspension, and/or, in some cases, expulsion from the university.

F. Office hours

There will not be set office hours each week; however students are encouraged to email or call the instructor to set up individual meetings.

TA (TBD) will be responsible for quizzes, question submissions, and homework assignments. Please contact her if you have questions about any of those issues.

G. Readings

How to access the class site:

- **TBD**

Required textbooks

1. Fowler, F.J. Jr., (1995), *Improving Survey Questions: Design and Evaluation*, Applied Social Research Methods Series Volume 38, Thousand Oaks, CA: SAGE Publications.
2. Bradburn, N., Sudman, S., and Wansink, B. (2004). *Asking Questions: The Definitive Guide to Questionnaire Design -- For Market Research, Political Polls, and Social and Health Questionnaires (Research Methods for the Social Sciences)*. Wiley and sons.

Other Recommended Books

1. **Tourangeau, R., L. J. Rips, and K. Rasinski. 2000. *The Psychology of Survey Response*. Cambridge, England: Cambridge University Press. (Recommended to buy)**
2. Couper, M. P., 2008. *Designing Effective Web Surveys*. New York: Wiley.
3. Presser, S., et al. (eds.). 2004. *Methods for Testing and Evaluating Survey Questionnaires*. Hoboken, New York: Wiley.
4. Fowler, F. J., and T. Mangione. 1990. *Standardized Survey Interviewing: Minimizing Interviewer-Related Error*. Newbury Park: Sage.
5. Schuman, H., and S. Presser. 1981. *Questions and Answers in Attitude Surveys*. New York: Academic Press.

Outline and Reading Schedule (subject to change)

Class #1 (June 6): Introduction – From Research Question to Questionnaire Instrument Development / General Principles of Questionnaire Development

Required Reading:

1. Fowler (1995): Chapter 1
2. Bradburn, Sudman, and Wansink (2004): Chapter 1
3. Aday (1996) *Matching the Survey Design to Survey Objectives*. In *Designing and Conducting Health Surveys: A Comprehensive Guide*. Chapter 2(pp 25-43)
4. Converse, J., and Presser, S. (1986), *Survey Questions: Handcrafting the Standardized Questionnaire*, Thousand Oaks, CA: Sage Publications, Inc, pages 9-51
5. Schaeffer, N.C., and Presser, S. (2003): "The Science of Asking Questions" *Annual Review of Sociology*, 29: 65-88.

Optional:

1. Hox, J., (1997). From Theoretical Concepts to Survey Questions. In L. Lyberg et al. (eds.). *Survey Measurement and Process Quality*, pp. 47-69.
2. Schwarz, N. (1997). Questionnaire Design: The Rocky Road from Concepts to Answers. In L. Lyberg et al. (eds.). *Survey Measurement and Process Quality*, pp. 29-45.
3. Krosnick, J. A. & Presser, S. (2010). Questionnaire design. In J. D. Wright & P.V. Marsden (Eds.), *Handbook of Survey Research (Second Edition)*. San Diego, CA: Elsevier.
4. Fowler, F.J., Jr. (1992), How Unclear Terms Affect Survey Data, *Public Opinion Quarterly*, 56(2), 218-231.
5. Tourangeau R.. & Bradbrun N. (2010). The Psychology of Survey Response. In J. D. Wright & P.V. Marsden (Eds.), *Handbook of Survey Research (Second Edition)*. San Diego, CA: Elsevier.
6. Belson, W. (1981), *The Design and Understanding of Survey Questions*, Aldershot, Hants: Gower. Pages 350-397.

Class #2 (June 8): Asking about Facts and Quasi-Facts

Due: Discussion Question Submission

Required Reading:

1. Fowler (1995): Chapter 2
2. Bradburn, Sudman, and Wansink (2004): Chapters 2 and 9

Optional:

1. Huttenlocher, J., L.V. Hedges, and N.M. Bradburn. 1990. "Reports of elapsed time: bounding and rounding processes in estimation". *Journal of Experimental Psychology Learning Memory and Cognition*, 16: 196-213.
2. Martin, E. T., DeMaio, and P. Campanelli. 1990. Context Effects for Census Measures of Race and Hispanic Origin, *Public Opinion Quarterly*, 54: 551-566.
3. Galesic, M., and Roger Tourangeau. 2007. "What is sexual harassment? It depends on who asks! Framing effects on survey responses." *Applied Cognitive Psychology*, 21:189-202.
4. Smith, T. (1984), The Subjectivity of Ethnicity, in C.F. Turner and E. Martin, *Surveying Subjective Phenomena*, Volume 2, New York: Russell Sage Foundation. Pages 117-128.
5. Bailar, B.A. and Rothwell, N.D. (1984), Measuring Employment and Unemployment, in C.F. Turner and E. Martin, *Surveying Subjective Phenomena*, pp129-142.
6. Tourangeau, R. 2000. "Remembering What Happened: Memory Errors and Survey Reports." pp. 29-48 in Arthur A. Stone et al. (eds.). *The Science of Self-Report: Implications for Research and Practice*, New Jersey: Lawrence Erlbaum.

Class #3 (June 13): Questions about Subjective Things (Attitudes)
Due: Discussion Question Submission; Homework 1

Required Reading:

1. Fowler (1995): Chapter 3
2. Bradburn, Sudman, and Wansink (2004): Chapters 4,6-8

Optional:

1. Converse and Presser (1986) – pages 35-39.
2. Schwarz, N. (2007). Attitude construction: Evaluation in context. *Social Cognition*, 25, 638-656.
3. Schuman, H. and Ludwig, J. (1983), The Norm of Even-Handedness in Surveys as in Life, *American Sociological Review*, 48:112-120.
4. Kalton, G. and Schuman, H. (1982), The Effect of the Question on Survey Responses: A Review, *The Journal of the Royal Statistical Society, Series A (General)*, 145(1), 42-57.
5. Schuman, H. and Presser, S. (1981), *Questions and Answers in Attitude Surveys: Experiments on Question Form, Wording, and Context*. New York: Academic Press. – Chapter 3.
6. Schaeffer, E. M., Krosnick, J. A., Langer, G. E., & Merkle, D. M. (2005). Comparing the quality of data obtained by minimally balanced and fully balanced attitude questions. *Public Opinion Quarterly*, 69, 417-428.

Class #4 (June 15): Sensitive Questions
Due: Discussion Question Submission

Required Reading:

1. Fowler (1995): Chapter 2
2. Bradburn, Sudman, and Wansink (2004): Chapter 3

Optional:

1. Tourangeau, Roger, and T. Yan. (2007). "Sensitive questions in surveys." *Psychological Bulletin*, 133(5):859-883.
2. Kreuter F, Presser S, Tourangeau R (2008) Social Desirability Bias in CATI, IVR, and Web Surveys: The Effects of Mode and Question Sensitivity, *Public Opinion Quarterly*, 847-865.
3. Droitcour, J., Caspar, R.A., Hubbard, M.L., Parsley, T.L., Visscher, W., Ezzati, T.M. (1991), The Item Count Technique as A Method Of Indirect Questioning: A Review of Its Development and a Case Study Application, in Biemer et al. (eds.) *Measurement Errors in Surveys* – Chapter 11, pp. 185-210
4. Campanelli, P., Dielman, T., and Shope, J. (1987), Validity of Adolescents' Self-Reports of Alcohol Use and Misuse Using a Bogus Pipeline Procedure, *Adolescence*, XXII(85), pages 7-11.
5. Lensvelt-Mulders, G., Hox, J., van der Heijden, P., Maas C. (2005), Meta-Analysis of Randomized Response Research: Thirty-Five Years of Validation. *Sociological Methods & Research*, Vol. 33, No. 3, 319-348.

Class #5 (June 20): Response Categories and Response Scales
Due: Discussion Question Submission

Required Reading:

1. Bradburn, Sudman, and Wansink (2004): Chapter 5
2. Holbrook, A.L., J.A. Krosnick, D. Moore, and Roger Tourangeau. 2007. "Response order effects in dichotomous categorical questions presented orally – The impact of question and respondent attributes." *Public Opinion Quarterly*, 71(3):325-348.

Optional:

1. Alwin, D.F. and Krosnick, J.A. (1985), The Measurement of Values in Surveys: A Comparison of Ratings and Rankings, *Public Opinion Quarterly*, 49, 535-552.
2. Malhotra, N., Krosnick, J. A., and Thomas, R. K. (2009). Optimal design of branching questions to measure bipolar constructs. *Public Opinion Quarterly*, 73(2), 304–324.
3. Galesic, M., Tourangeau R., Couper M.P., Conrad, F. (2008). Eye-Tracking Data: New Insights on Response Order Effects and Other Cognitive Shortcuts in Survey Responding. *Public Opinion Quarterly*, 72, 5, 892-913
4. Krosnick, J. A., Miller, J. M., & Tichy, M. P. (2004). An unrecognized need for ballot reform: Effects of candidate name order. In A. N. Crigler, M. R. Just, and E. J. McCaffery (Eds.), *Rethinking the vote: The politics and prospects of American election reform*. New York, NY: Oxford University Press.

Class #6 (June 22): Layout and Mode
Due: Discussion Question Submission & Homework 2

Required Reading:

1. Fowler (1995): Chapter 4
2. Bradburn, Sudman, and Wansink (2004): Chapters 10-12

Optional:

1. Couper, Mick P., Conrad, Frederick G., and Roger Tourangeau. 2007. "Visual context effects in web surveys." *Public Opinion Quarterly*, 71(4):623-634.
2. Redline, C. and Dillman, D. (2002), The Influence of Alternative Visual Designs on Respondents' Performance with Branching Instructions in Self-Administered Questionnaires, in Groves et al. (eds), *Survey Nonresponse*, New York, Wiley. – Chapter 12, pages 179-193.
3. Dillman, D. (2000). *Mail and Internet Surveys: The Tailored Design Method*, New York: Wiley. – Chapter 3, pages 79-140; chapter 11.
4. House, C. and Nicholls, W. (1988), "Questionnaire Design for CATI" chapter 26 in R. Groves et al., *Telephone Survey Methodology*. Wiley: 1988.
5. Jenkins, C. and Dillman, D. (1997), Towards a theory of self-administered questionnaire design. In Lyberg et al. (eds.) *Survey Measurement and Process Quality*– Chapter 7, pages 165-196.
6. Suchman, L. and Jordan, B. (1990), "Interactional troubles in face-to-face survey interviews," *Journal of the American Statistical Association*, v85: 232-241.
7. Schaeffer, N. (1991), "Conversation with a Purpose--or Conversation? Interaction in the Standardized Interview," Ch. 19 in Biemer et al. (eds.). *Measurement Errors in Surveys*, Wiley

Classes #7 & 8(June 27 & 29): In-class progress reports

Class #9 (July 4): NO CLASS

Class #10 (July 6): Pretesting: Tools for Evaluating and Testing Questionnaires

Due: Discussion Question Submission

Required Reading:

1. Fowler (1995): Chapters 5-7
2. Willis, G. (2005). *Cognitive Interviewing: A tool for Improving Questionnaire Design*, Sage. Chapter 1-2
3. Yan, T., Kreuter, F., and Tourangeau, R. (2012). Evaluating Survey Questions: A Comparison of Methods. *Journal of Official Statistics*, 28, 503-529.

Optional:

1. Oksenberg, L., Cannell, C. and Kalton, G. (1991), New Strategies for Pretesting Survey Questions, *Journal of Official Statistics*, 7(3), 349-365.
2. Saris, W.E., and Gallhofer, I.N. (2007): *Design, Evaluation, and Analysis of Questionnaires for Survey Research*. Wiley. Chapter 10 and 13.
3. Kreuter, F., Yan, T., and Tourangeau, R. (2008). Good Item or Bad-Can Latent Class Analysis Tell?: The Utility of Latent Class Analysis for the Evaluation of Survey Questions. *Journal of the Royal Statistical Society (Series A)*, 171, 723-738.
4. Conrad, F. and Blair, J. (2009): Sources of Error in Cognitive Interviews. *Public Opinion Quarterly*, 73, 1, 32-55
5. Forsyth, B.H., and Lessler, J.T. (1991), Cognitive Laboratory Methods: A Taxonomy, Chapter 20 in Biemer, et al (eds), *Measurement Errors in Surveys*, New York: Wiley. – Chapter 20, pages 393-418.
6. Biemer, P.P., Wiesen, C. (2002): Measurement error evaluation of self-reported drug use: a latent class analysis of the US National Household Survey on Drug Abuse, *J. R. Statist. Soc. A* 165, Part 1, pp. 97–119

Additional Sources for Testing Survey Questionnaires

1. Hunter, J., and DeMaio, T. (2003): Results & Recommendations from the Cognitive Pretesting of the 2003 Public School Questionnaire from the Schools and Staffing Survey (example on how a report can be written) <http://www.census.gov/srd/papers/pdf/ssm2003-16.pdf>
2. Campanelli, P. (1997), Testing Survey Questions: New Directions in Cognitive Interviewing, *Bulletin de Methodologie Sociologique*, 55, 5-17.
3. DeMaio, T. and Landreth, A. (2004), Do Different Cognitive Interview Techniques Produce Different Results? in Presser, et. al. (Eds.), *Methods for Testing and Evaluating Survey Questionnaires*.
4. Forsyth, B., Rothgeb, J., and Willis, G. (2004), Does Question Pretesting Make a Difference? An Empirical Test Using a Field Survey Experiment, in Presser, et. al. (Eds.), *Methods for Testing and Evaluating Survey Questionnaires*.
5. Hansen, S. and Couper, M. (2004), Usability Testing as a Means of Evaluating Computer Assisted Survey Instruments, in Presser, et. al. (Eds.), *Methods for Testing and Evaluating Survey Questionnaires*.
6. Willis, G. (2004), Cognitive Interviewing Revisited: A Useful Technique, in Theory? in Presser, et. al. (Eds.), *Methods for Testing and Evaluating Survey Questionnaires*.
7. Yan, T., and Tourangeau, Roger. (2008). "Fast times and easy questions: The effects of age, experience and question complexity on web survey response times." *Applied Cognitive Psychology*, 22(1):51-68.

Class #11 (July 11): Web and Mobile Surveys

Due: Discussion Question Submission

Required Reading:

1. Couper, M., Traugott, M., & Lamias, M. (2001). Web survey design and administration. *Public Opinion Quarterly*, 65, 230-253.
2. Tourangeau, R., Couper, M., & Conrad, F. (2004). Spacing, position, and order: Interpretive heuristics for visual features of survey questions. *Public Opinion Quarterly*, 68, 368-393.

Optional:

1. Conrad, F. G., Schober, M. F., & Coiner, T. (2007). Bringing features of human dialog to web surveys. *Applied Cognitive Psychology*, 21, 165-188.
2. Callegaro, M (2010). Do You Know Which Device Your Respondent Has Used to Take Your Online Survey? Survey Practice, December. <http://www.surveypractice.org/>.
3. Buskirk, T. D. and Andrus, C. (2012). Smart Surveys for Smartphone: Exploring Various Approaches for Conducting Online Mobile surveys via Smartphones. Survey Practice. Available at: <http://surveypractice.wordpress.com/2012/02/21/smart-surveys-for-smart-phones/>

Class #12 (July 13): Cross-cultural and Translation Issues

Due: Discussion Question Submission & HW 3

Required Reading:

1. Harkness, J.A., Villa, A., and Edwards, B. (2011). Translation, Adaptation, and Design. In Harkness et al. (eds.). *Survey Methods in Multinational, Multiregional, and Multicultural Contexts*, pp.117-140.
2. Kleiner, Brian, and Pan, Yuling, and Bouic, Jerelyn (2009). The Impact of Instructions on Survey Translation: An Experimental Study, *Survey Research Methods*, 3, 3, 113-122.

Optional:

1. Adachi, Y. (2011). How Not to Get Lost in Translation: Tips for Communicating with International Peers. *Amstat News*, p33-34.
2. Schwarz, N. (2003). Culture-sensitive context effects: A challenge for cross-cultural surveys. In Harkness et al. (eds.) *Cross-cultural survey methods*, pp. 93-100.
3. Johnson T., & van de Vijver, F.J. (2002). Social desirability in cross-cultural research. In Harkness et al. (eds.) *Cross-cultural survey methods*, pp. 193-202.

Class #13 (July 18): TBD depending on class interests: Sampling, Biometrics, Real world applications, Pretest 2, discussion question roundup

Due: Discussion Question Submission

Class #14 (July 20): In-Class Exam

Class #15 (July 25): Student Presentations & HW 4

Class #16 (July 27): Student Presentations & HW 4

Additional Sources

1. Belson, W. A. 1986. *Validity in Survey Research*. Aldershot, England: Gower.
2. Biemer, P. P., R. M. Groves, L. E. Lyberg, N. A. Mathiowetz, and S. Sudman. (eds.). 1991. *Measurement Errors in Surveys*. New York: Wiley.
3. Biderman, A.D., and Cantor, D. 1984. A longitudinal analysis of bounding, respondent conditioning and mobility as sources of panel bias in the National Crime Survey. *Proceedings of the Survey Methodology Section of the American Statistical Association*, pp. 708-713.
4. Bradburn, N M., S. Sudman, and associates. 1979. *Improving Interview Method and Questionnaire Design*. San Francisco: Jossey-Bass.
5. Briggs, C. L. 1986. *Learning How to Ask*. New York: Cambridge University Press.
6. Heath, A. and Martin, J. (1997), Why Are There so Few Formal Measuring Instruments in Social and Political Research? in Lyberg et al. (eds.) *Survey Measurement and Process Quality*
7. Jones, E.F. and J.D. Forrest 1992. "Underreporting of abortion in surveys of U.S. women: 1976 to 1988." *Demography*, 29, 113-126.
8. Lessler J.T. and J. M. O'Reilly 1997. "Mode of Interview and Reporting of Sensitive Issues: Design and Implementation of Audio Computer-Assisted Self-Interviewing." In Harrison, Hughes (ed.) *The Validity of Self-Reported Drug Use: Improving the Accuracy of Survey Estimates*, NIDA Research Monograph 167.
9. Lyberg, L., et al. (eds.). 1997. *Survey Measurement and Process Quality*. New York: Wiley.
10. Payne, S. 1980. *The Art of Asking Questions*. Princeton, N.J.: Princeton University.
11. Maynard, D. W., et al. (eds.). 2002. *Standardization and Tacit Knowledge: Interaction and Practice in the Survey Interview*. New York: Wiley.
12. Means, B., Nigam, A., Zarrow et al. 1989 Autobiographical memory for health-related events. *Vital Health Statistics* 6(2).
13. Saris, W. E. 1988. *Variation in Response Functions: A Source of Measurement Error in Attitude Research*. Amsterdam: Sociometric Research Foundation
14. Schwarz, N. and S. Sudman (eds.). 1994. *Autobiographical Memory and the Validity of Retrospective Reports*. New York: Springer Verlag.
15. Stone, A. A., et al. (eds.) 2000. *The Science of Self-Report: Implications for Research and Practice*. Mahwah, New Jersey: Lawrence Erlbaum.
16. Tanur, J. M., (ed.) 1992. *Questions about Questions*. New York: Russell Sage.
17. Tourangeau, R., Rusingi, K., Jobe, J., Smith, T.W. and W.F. Pratt (1997). "Sources of Error in a Survey on Sexual Behavior." *Journal of Official Statistics*. 12:341-365.
18. Turner, A.G. 1981. "The San Jose Recall Study." pp. 22-27 in Lehnen, R.G. and W.G. Skogan, *The National Crime Survey: Working Papers, NCJ-75374*. Bureau of Justice Statistics, U.S. Department of Justice.
19. Turner, C. F. and E. Martin (eds.) 1984. *Surveying Subjective Phenomena*. New York: Russell Sage.