

Question Testing Methods

Summer Institute in Survey Research Techniques, 2017

Instructor: Dr. Pamela Campanelli

Time: 12 – 16 June, 1.00 to 4.00 pm

Location: To be determined

Office and Phone: To be determined

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Course Description

This course aims to introduce the broad range of techniques currently available to test and improve survey questionnaires. It has two strands: the first focusing on the theoretical and experimental literature related to question testing; the second, a "hands-on" approach, focusing on how to implement each method. Question testing methods covered include standard field pretesting, expert review, cognitive forms appraisal, Quaid (Question Understanding Aid), SQP (Survey Quality Predictor), interviewer rating form, respondent debriefing and vignettes, web probing, classical behavior coding, sequence-based and reduced versions of behaviour coding, cognitive interviewing and variations, focus groups for testing survey questions, split ballot experiments and an introduction to analysis-based methods such as item response theory, latent class analysis, and multi-trait-multi-method experiments. Discussion will focus on the strengths and weaknesses of each individual method as well as proposals for multi-method question evaluation strategies.

Evaluation

Grading for the course will be based on a two-part assignment due 2 weeks after the last day of class. The first part will involve writing about your practical insights from the “hands on” component of the course. The second component will tap your knowledge of the required readings. (Please submit your assignments on time, as points will be removed for late assignments.)

Prerequisite

There is no prerequisite, but some knowledge of questionnaire design is of value.

Course Website

The course website will be on CANVAS which can be accessed through (<https://ctools.umich.edu/gateway/>). The website contains assigned articles (for some you need the password 'surv630cam') and pdfs of the course slides and is maintained by Dr. Pamela Campanelli [dr.pamela.campanelli@thesurveycoach.com]. Once the website is “published/open” . . .

Students using a UMich e-mail can access the site instantly with their UMich e-mail address and password.

Visiting students will be given a UMich username and password upon arrival. This is an important account as all details about the Summer Institute will come through this email.

It is also possible for Visiting students and UMich students who wish to use a non-UMich e-mail (in addition to their UMich one) to access the course website by getting a Friend Account. A UMich

Friend Account, a special kind of computer account that is used to give non-University of Michigan members access to the general University of Michigan web environment. You can use any e-mail address you want for your Friend Account, but this same e-mail address has to be entered into the CANVAS system by Dr. Campanelli in order for you to access the course materials.

Steps to accessing the website with a non-UMich e-mail:

1. Tell Dr. Campanelli your preferred e-mail address so this can be put in CTools.
2. When you receive a reply from her that it is in, go to <https://weblogin.umich.edu/friend/> and do what it says to create a Friend Account. This is just a few simple steps.
3. You can then go to <https://ctools.umich.edu/portal>, choose CANVAS and “login in” using your Friend Account username and password.
4. This will then show you a tab for the class (and any other classes where that e-mail has been entered in CANVAS)
5. Be sure to contact Dr. Campanelli if you have any problems.

Course Schedule

Day	Topic	Suggested Reading
12 June	<ul style="list-style-type: none"> • Overview of the course • Traditional testing methods and overview of innovative ones • Expert review • Systematic questionnaire review/cognitive forms appraisal with review of 4 cognitive steps • Workshop in systematic review/cognitive forms appraisal • Quaid (Question Understanding Aid) and SQP (Survey Quality Predictor) 	<ul style="list-style-type: none"> • Converse and Presser (1986)-Chapter 3, Pages 65-75 • Cannell, Oksenberg, Kalton, Bischooping, Fowler, (1989) – Pages 1-4, 15-17 • Scheuren (2005) • Snijkers (2002) Chapter 4-Pages 63-96.
13 June	<ul style="list-style-type: none"> • Quaid and SQP (continued) • Interviewer rating form and other interviewer guidelines for testing • Workshop in traditional pretesting • How to do respondent debriefing • Workshop in respondent debriefing • Web Probing • Vignettes (including CUB models for choosing vignettes) • How to do classical behaviour coding 	<ul style="list-style-type: none"> • Martin (2006) • Fowler (2011)
14 June	<ul style="list-style-type: none"> • Classical behaviour coding (continued) • Workshop in behaviour coding • Sequence-based approaches and reduced versions of behaviour coding • How to do cognitive interviewing • How to do cognitive interviewing 	<ul style="list-style-type: none"> • Willis (1999)
15 June	<ul style="list-style-type: none"> • How to do cognitive interviewing (continued) • Workshop in cognitive interviewing • Controversy in the cognitive interview, 3-Step test interview and other variations/uses of cognitive interviewing • Usability testing • How to do focus groups for question testing and variations • How to do card sorts and with focus group 	<ul style="list-style-type: none"> • Miller (2011) • Willis (2011)

16 June	<ul style="list-style-type: none"> • Card sorts and with focus group (continued and with workshop) • Split ballot experiments / variation with discrete choice experiments • Introduction to analysis-based methods for testing survey questions including item response theory, multi-trait-multi-method experiments and latent class analysis • Overview of testing methods, combinations and options • Recommendations for multi-method testing procedures and final questions 	<ul style="list-style-type: none"> • Fowler (2004) • Presser and Blair (1994)
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Required Readings

Converse, J., and Presser, S. (1986), The Tools at Hand, Chapter 3 in *Survey Questions: Handcrafting the Standardized Questionnaire*, Sage Series No 63, Thousand Oaks, CA: Sage Publications, Inc. – Pages 65-75.

Cannell, C., Oksenberg, L., Kalton, G., Bischooping, K., Fowler, F.J. (1989), *New Techniques for Presting Survey Questions*, Final Report August, 1989) – Pages 1-4, 15-17.

Fowler, F. J. Jr. (2004), The case for more split-sample experiments in developing survey instruments, in Presser et al (eds), *Methods for Testing and Evaluating Survey Questionnaires*, Hoboken, NJ: Wiley.

Fowler, F. Jr. (2011), Coding the Behavior of Interviewers and Respondents to Evaluate Survey Questions, in: J. Madans, K. Miller, A. Maitland, and G. Willis (eds), *Question Evaluation Methods*, Hoboken, NJ: Wiley, pages 7-21.

Martin, E. (2006), Vignettes and Respondent Debriefing for Questionnaire Design and Evaluation, Research Report Series, Survey Methodology #2006-8, Washington, D.C.: U.S. Bureau of the Census.

Miller, K. (2011), Cognitive Interviewing, Chapter 5 in J. Madans, K. Miller, A. Maitland, and G. Willis (eds), *Question Evaluation Methods*, Hoboken, NJ: Wiley, pages 51-75.

Scheuren, F. (ed), What is a Survey, Chapter 7 How to Conduct Pretesting, American Statistical Association (Available on <https://www.whatisasurvey.info/overview.htm>)

Snijkers, G. (2002), Cognitive Laboratory Methods: Current Best Practice, Chapter 4 in *Cognitive Laboratory Experiences on Pre-testing Computerised Questionnaires and Data Quality*, Heerlen: Statistics Netherlands, pages 63-96.

Presser, S., and Blair, J. (1994), Survey Pretesting: Do Different Methods Produce Different Results?, *Sociological Methodology*, 73-104.

Willis, G. (1999), Cognitive Interviewing: A “How To” Guide, Research Triangle Institute.

Willis, G. (2011), Response 1 to Miller’s Chapter: Cognitive Interviewing, Chapter 6 in J. Madans, K. Miller, A. Maitland, and G. Willis (eds), *Question Evaluation Methods*, Hoboken, NJ: Wiley, pages 77-91.

Other Useful Readings

Blair, J. and Conrad, F. (2011), Sample Size for Cognitive Interview Pretesting, *Public Opinion Quarterly*, 75(4) 636–658.

Biemer, P. (2004), Modeling Measurement Error to Identify Flawed Questions, in Presser et al (eds), *Methods for Testing and Evaluating Survey Questionnaires*, Hoboken, NJ: Wiley.

Dijkstra, W. and Ongena, Y. (2006), Question-Answer sequences in Survey Interviews, *Quality & Quantity*, 40(6), 983-1011.

Reeve, B. and Mâsse, L. (2004), Item Response Theory Modeling for Questionnaire Evaluation, in Presser et al (eds), *Methods for Testing and Evaluating Survey Questionnaires*, Hoboken, NJ: Wiley.

Saris, W., van der Veld, W. and Gallhofer, I. (2004), Development and Improvement of Questionnaire Using Predictions of Reliability and Validity, in Presser et al (eds), *Methods for Testing and Evaluating Survey Questionnaires*, Hoboken, NJ: Wiley.

Willis, G. (2005), *Cognitive Interviewing: A Tool for Improving Questionnaire Design*, Thousand Oaks, CA: Sage.