

Questionnaire Design
UNC: Soc 761
Spring, 2021

Time: Fridays, 1:00 – 3:30 (January 22 – May 7)

Location: Virtual (Online only)

Instructors:	Emilia Peytcheva, Ph.D.	Emily Geisen, M.S.
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Office Hours: By appointment

Overview:

This course focuses on the design of questions and questionnaires used in survey research. The course will provide an overview of the theoretical and experimental literature related to question and questionnaire design as well as focusing on practical issues in the design, critique, and interpretation of survey questions that are often not taught in formal courses. Discussion will focus on the measurement of both subjective and objective phenomena. Topics include cognitive guidelines for question construction to ensure respondent comprehension, techniques for measuring the occurrence of past behaviours and events, the effects of question wording, response formats, and question sequence on responses, an introduction to the psychometric perspectives in multi-item scale design, combining individual questions into a meaningful questionnaire, special guidelines for self-completion surveys versus interview surveys, strategies for obtaining sensitive or personal information, issues associated with translating survey questions, and an introduction to techniques for testing survey questions.

The expectation is that assigned readings are completed prior to attending the class for which the materials are assigned.

Evaluation:

Grading for the course will be based on five homework exercises and a final exam. The exercises will focus on solving practical problems related to questionnaire design and will account for 50% of the total grade. The final exam will assess participants' mastery and critical appraisal of the required readings (textbooks and articles in course pack) and will account for 50% of the grade. NOTE: Although class participation is not part of the grade, it is expected that students will attend class and participate in discussions and small group activities.

Prerequisite:

An introductory course in survey research methods or equivalent experience.

Required Texts

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. Tourangeau, R., Rips, L.J., and Rasinski, K. (2000), *The Psychology of Survey Response*, Cambridge: Cambridge University Press.
3. Willis, G.B. (2005), *Cognitive Interviewing: A Tool for Improving Questionnaire Design*, Thousand Oaks, CA: Sage Publications, Inc.

Course Website:

Sakai.unc.edu – look for SOCI761.001.SP21

Copies of the instructor's PowerPoint slides will be available on the course website each week on the Thursday morning before the Friday afternoon class. In addition, homework assignments and the final exam will be posted to the website on the schedule outlined below.

Reading Schedule

January 22

Class 1. Introduction, Measurement Error, Standardization, and Operationalizing Constructs

Assignment 1 available on the class website

Instructor: Peytcheva

Fowler, Chapter 1: pages 1 – 7.

Aday, L.A. (1996). *Designing and Conducting Health Surveys: A Comprehensive Guide*, San Francisco: Jossey-Bass. Chapter 2: pages 25 – 43.

Fowler, F. and Mangione, T. (1990), *Standardized Survey Interviewing: Minimizing Interviewer-Related Error*, Newbury Park: Sage. Chapter 5, pages 77 – 95.

Sudman, S., Bradburn, N., and Schwarz, N. (1996). *Thinking About Answers: The Application of Cognitive Processes to Survey Methodology*, San Francisco: Jossey-Bass Publishers. Chapter 3, pages 55 – 79.

Bradburn, N. (2004). “Understanding the Question-Answer Process,” *Survey Methodology*, vol. 30, no. 1, pp 5 – 15.

January 29

Class 2. Cognitive Processes Related to Answering Questions

Instructor: Peytcheva

Willis, Chapters 2 and 3: pages 12 – 41.

Tourangeau, et. al., Chapters 1 and 2 and pages 313 – 323.

Krosnick, J. A. (1991) “Response strategies for coping with the cognitive demands of attitude measures in surveys.” *Applied Cognitive Psychology*, 5: 213-236.

Sudman, S., Bradburn, N., and Schwarz, N. (1996). *Thinking About Answers: The Application of Cognitive Processes to Survey Methodology*, San Francisco: Jossey-Bass Publishers. Chapters 4 & 5, pages 80 – 99 and 100 – 162.

February 5

Class 3. Writing Factual and Behavioral Questions / Memory Issues I

Assignment 1 due at 4:30pm

Assignment 2 available on the class website

Instructor: Geisen

Fowler, Chapter 2, pages 8 – 33 only.

Tourangeau, et. al., Chapters 3 – 5, pages 62 – 164 and Chapter 8, pages 230 – 249 only

February 12

Class 4. Writing Factual and Behavioral Questions / Memory Issues II

Instructor: Geisen

Belli, R.F. (1998). The Structure of Autobiographical Memory and the Event History Calendar: Potential Improvements in the Quality of Retrospective Reports in Surveys, *Memory*, 6, 383 – 406.

Loftus, E. and Marburger W. (1983). Since the Eruption of Mt. St. Helens, Has Anyone Beaten You Up? Improving the Accuracy of Retrospective Reports with Landmark Events, *Memory and Cognition*, 11, 114 – 120.

Martin, E. DeMaio, T., and Campanelli P. (1990). Context Effects for Census Measures of Race and Hispanic Origin, *Public Opinion Quarterly*, 54, 551 – 566.

February 19

Class 5. Constructing Attitude and Other Non-Factual Questions

Assignment 2 due at 4:30pm

Assignment 3 available on the class website on

Instructor: Peytcheva

Tourangeau, Rips, & Rasinski (2000), Chapters 6, 7, 239-254

Fowler (1995), Chapter 3.

February 26

Class 6. Constructing Attitude and Other Non-Factual Questions II

Instructor: Peytcheva

Alwin, D.F., & Krosnick, J.A. (1991). The Reliability of Survey Attitude Measurement. *Sociological Methods & Research*, 20, 139-181.

Schuman, H. (1972). Attitudes vs. Actions Versus Attitudes vs. Attitudes. *Public Opinion Quarterly*, 36, 347-354.

Schwartz, Norbert, Knäuper, B., Hippler, H.J., Noelle-Neumann, E. and F. Clark (1991) "Rating Scales: Numeric Values May Change the Meaning of Scale Labels." *Public Opinion Quarterly* 55: 618-630.

March 5

Class 7. Design of Self-Administered Questionnaires

Instructor: Geisen

Dillman, D., Smyth, J., & Christian, L. (2014). *Internet, Phone, Mail, and Mixed-Mode Surveys: The Tailored Design Method*. New York: John Wiley and Sons. Chapter 6: pages 169-225.

Optional: Dillman, D., Smyth, J., & Christian, L. (2014). *Internet, Phone, Mail, and Mixed-Mode Surveys: The Tailored Design Method*. New York: John Wiley and Sons. Chapter 10: pages 351-396.

March 12
No Class – Wellness Days

March 19
Class 8. Web and Mobile Phone Surveys
Assignment 3 due by 4:30 pm
Instructor: Geisen

Dillman, D., Smyth, J., & Christian, L. (2014). *Internet, Phone, Mail, and Mixed-Mode Surveys: The Tailored Design Method*. New York: John Wiley and Sons. Chapter 9: pages 301-349.

March 26
Class 9. Questionnaire Pretesting Methods 1
Assignment 4 available on class website
Instructor: Peytcheva

Willis (2005) Chapters 1, 4, 5, and 14.

Fowler, (1995), Chapters 5 and 7.

Fowler, F.J. (2004) “The Case for More Split-Sample Experiments in Developing Survey Instruments.” In Presser, S., Rothgeb, J.M., Couper, M.P., Lessler, J.T., Martin, E., Martin, J. and E. Singer (eds) *Methods for Testing and Evaluating Survey Questionnaires*. Hoboken, NJ: John Wiley & Sons, pp. 173 – 188.

Esposito, J.L. and J. M. Rothgeb (1997) “Evaluating Survey Data: Making the Transition from Pretesting to Quality Assessment.” Lyberg, L., Biemer, P., Collins, M., de Leeuw, E., Dippo, C., Schwarz, N. and D. Trewin (eds) *Survey Measurement and Process Quality*. New York: John Wiley & Sons. pp. 541 – 572.

April 2
NO CLASS - HOLIDAY

April 9
Class 10. Questionnaire Pretesting Methods 2
Instructor: Geisen

Geisen and Romano Bergstrom (2017), Chapters 1-3, 7

April 16

Class 11. Mode Differences and Mixed-Mode

Assignment 4 due by 4:30pm

Assignment 5 available on class website

Instructor: Geisen

Tourangeau, et. al., Chapter 10: pages 289 – 312.

House, C. (1985). Questionnaire Design With Computer Assisted Telephone Interviewing, *Journal of Official Statistics*, vol. 1, no. 2, pages 209 – 219.

Kinsey, S. and Jewell, D. (1998). A Systematic Approach to Instrument Development in CAI, in Couper, M. Baker, R., Bethlehem, J., Clark, C., Martin, J., Nicholls, W., and O'Reilly, J. (eds.) *Computer Assisted Survey Information Collection*, New York: John Wiley and Sons, Chapter 6: 105 – 123.

Couper, M. (1999). The Application of Cognitive Science to Computer Assisted Interviewing, in Sirken, M., Hermann, D., Schechter, S., Schwarz, N., Tanur, J., and Tourangeau, R. (eds.), *Cognition and Survey Research*, New York: John Wiley and Sons. – Pages 277 – 300.

April 23

Class 12. Translation and Other Issues Related to Surveys in Multiple Languages

Instructor: Peytcheva

Harkness, J., (2003). Questionnaire Translation, in Harkness, et. al, (eds), *Cross-Cultural Survey Methods*, New York: Wiley. - Pages 35 – 56.

Smith, T. (2003). Developing Comparable Questions in Cross-National Surveys, in Harkness, et. al, (eds), *Cross-Cultural Survey Methods*, New York: Wiley. - Pages 69 – 91.

Harkness, J., (2003). Questionnaire Translation, in Harkness, et. al, (eds), *Cross-Cultural Survey Methods*, New York: Wiley. - Pages 35 – 56.

Smith, T. (2003). Developing Comparable Questions in Cross-National Surveys, in Harkness, et. al, (eds), *Cross-Cultural Survey Methods*, New York: Wiley. - Pages 69 – 91.

April 30

Class 13. Sensitive Questions and Designing Questionnaires for Special Populations

Assignment 5 due by 4:30pm

Instructor: Geisen

Fowler, Chapter 3: pages 33 – 44 only

Tourangeau, et. al., Chapter 9: pages 255 – 288.

Schaeffer, N.C. (2000) Asking Questions About Threatening Topics: A Selective Overview, in Stone, A., Turkkan, J.S., Bachrach, C.A., Jobe, J.B., Kurtzman, H.S., and Cain, V.S. (eds.), *The Science of Self-Report, Implications for Research and Practice*. Lawrence Erlbaum Associates: Mahwah, New Jersey.

Tourangeau, R. and Smith, T. W. (1996). Asking Sensitive Questions, *Public Opinion Quarterly*, volume 60, no. 2, 275 – 321.

deLeeuw, E., Borgers, N., and Smits, A. (2004). Pretesting Questionnaires for Children and Adolescents, in Presser, S., Rothgeb, J., Couper, M., Lessler, J., Martin, E., Martin, J., and Singer, E. (eds.) *Methods for Testing and Evaluating Survey Questionnaires*, New York: John Wiley and Sons, Chapter 20: pages 409 – 429.

April 30: Final Exam Available on the class website

May 7: FINAL EXAM DUE by 6 pm