



# Whiteboard

Maximizing Human Capital

Survey Development  
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Creating a valid, reliable and useful survey requires skill, education and experience. Unfortunately, most surveys are written by unqualified authors. Below are basic guidelines we utilize when building survey instruments for our clients.

## Survey Development Guidelines

1. Construct Operationalized: Specifically define the concept/competency to be measured and its scope. What does “communication” mean and what doesn’t it mean? For example, what format of communication do we want to assess, e.g., hardcopy, email, reports, presentations, etc.? To whom are we communicating, e.g., 1:1, team, department, business unit, broader organization, etc.? What is the purpose of the communication, e.g., information sharing, planning, problem-solving, brainstorming, etc.? Are we concerned about the information being stored as a resource and being easily retrieved and shared? Are we concerned about the process – how the information is communicated?
2. Current understanding of issue. Why has this been identified as a problem? For whom is it a problem? What do we know about the current problem, e.g., data from Credo Survey?
3. Purpose. What is the purpose of the survey? Do we want to generally understand the problem more fully or do we want to use the survey to create a strategic plan?
4. Item Pool. Based on operationalization, understanding and purpose, do we have a pool of questions to draw from or do we need to create additional items?
5. Item format. Given the purpose, what is the most appropriate format of the questions, e.g., forced choice, Likert scale, bipolar adjectives, “real-ideal” differential, forced ranking, open-ended?
6. Survey format. Should the survey be delivered electronically, hardcopy or through individual or group interviews – or some combination. Should the survey be anonymous? Should we collect data by functional area? Should we break the data down by specific categories, e.g., management vs. employee?
7. Pilot survey. Test the survey with a group of individuals similar to target audience. Ask for feedback as part of the survey.
8. Item analysis. Conduct basic analysis on the sample data to examine distribution, measures of dispersion and reliability.



9. Survey modifications. Modify the survey based on feedback and item analysis.
10. Distribute and analyze survey. Conduct both quantitative and qualitative analysis.
11. Follow-up. Individual interview or focus groups.
12. Survey report. Create a report that serves the initial purpose of the study.
13. Results dissemination. How best are the findings distributed and to whom?
14. Action plan. What is going to happen as a result of these findings?
15. Post-assessment. How will we gauge the effectiveness of the intervention? What is the most appropriate way in which to measure whether we have made a difference and when do we conduct this assessment?