



Survey Design: Key Tips and Tricks

From first question to IRB approval

1



Start with a clear purpose.

Define your research question, the information you need and the gaps in existing data before writing survey questions.

2



Build on validated instruments.

Review established surveys for relevant questions and response options. Check their fit for your population and test any adaptations.

3



Bring in survey expertise.

Ask behavioral scientists or survey specialists to review your draft. If local resources are limited, seek collaborators through professional networks.

4



Write for your participants.

Use plain language and avoid scientific jargon. Check that wording and response options reflect your audience's backgrounds and experiences.

5



Make the survey easy to follow.

Group related questions, give clear section instructions and consider question order. Prioritize key information and limit participant burden.

6



Pilot with your intended audience.

Review the draft with colleagues, then seek feedback from representative participants. Test clarity, response options and flow—even when using validated questions.

7



Ask participants to think aloud.

Use cognitive interviews to explore how people interpret difficult questions and choose responses. Refine unclear items using their feedback.

8



Plan for time, funding and IRB review.

Budget for expertise, testing and revisions. Allow time for institutional review board (IRB) feedback and obtain required approvals before participant testing.

Based on the CGA-IGC webinar with Holli Loomans-Kropp, PhD, MPH:
"Survey Design Tips: From First Question to IRB Approval"

Define. Test. Refine.