WHAT IS A SURVEY?
The gathering of data or opinions from participants using a structured set of questions.

A SURVEY ACTIVITY MAY BE ORGANIZED
- virtually and/or face-to-face.
- in real-time with immediate feedback.
- over a set period of time.
- at any stage of a project.

USE IT TO
- monitor progress.
- evaluate results.
- capture participants’ perspectives and opinions or surface areas of consensus.
- conduct a needs assessment or prioritize areas of action.
- enable knowledge sharing.

HOW TO USE IT
- Use surveys before, during, or after a knowledge exchange to make learning more relevant, interactive, and useful for the participants.
- Surveys are effective polling tools to prompt discussions, surface areas for consensus or stakeholder ownership, and prioritize important next steps or action items and outputs from knowledge exchanges.
- Make sure you are asking the right questions. Once you determine the right questions for your context, check that they are written clearly and concisely. Keep the following in mind:
  › Include simple instructions.
  › Use brief, tightly focused questions that cover one subject.
  › Check that the questions are not general, ambiguous, or leading.
  › Follow good practice in designing the response options.
- Use close-ended questions when appropriate and if you plan to aggregate responses. Developing the right questions is more time-consuming up front, but makes analysis of results simpler.
- Use open-ended questions when you require a narrative response, and limit the number of response options. Carefully consider your capacity to process open-ended responses and how you will use them; narrative responses require more intensive data analysis for interpreting the results.
- Use balanced rating scales and label each option on the scale to increase the likelihood that respondents understand the scale.
  › Provide space for additional explanation or comments at the end of your survey.
- Pretest your survey before distribution—ideally, with individuals similar to your respondents.