# The checklist for everything

When you can answer the questions under each heading, you’re ready to move onto the next step.

### Goals (from Chapter 1)

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| **Checklist question** | **Is finished when …** |
| Who do you want to ask? | You have a clear definition of a group of people and know exactly who is and isn’t in the group. |
| What do you want to ask them? | You have a single Most Crucial Question. |
| What decision will you make? | You have agreed on a method of scoring or counting the answers to your Most Crucial Question, and you have a draft of the presentation or other method of sharing the results. |

### Sample (from Chapter 2)

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| **Checklist question** | **Is finished when …** |
| How did you find your sample? | If you’ve chosen “narrow down,” you have a list and you have investigated its quality.  If you’ve chosen “in the moment,” you have thought about how to intercept people and are ready to test the idea in your pilot study.  If you’ve chosen “snowball up,” you have decided on a method of starting the snowball. |
| How many people do you need to respond? | You have agreed on the number of responses to aim for. |
| What response rate do you expect to get? | You have an expected response rate from a previous similar survey or from the pilot test of this survey. |
| Have you decided on a representativeness question? | You have a small number of questions that are appropriate to the topic of this survey and that allow you to compare the results of this survey with other data t about your defined group of people that you already have. |
| Do you know the Burning Issues? | You have completed interviews with people in your defined group, identified issues, and ideally triangulated with results from other types of research. |

### Questions (from Chapter 3)

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| **Checklist question** | **Is finished when…** |
| Do your questions use familiar words in familiar ways? | You have completed cognitive interviews with people in your defined group.  You have iterated the questionnaire based on what you found in the cognitive interviews.  You have completed another round of cognitive interviews and checked that the problems are sorted out.  (Question writing is challenging – sometimes it feels like it is never entirely finished, but you have done all the iterations you can manage in the time available). |
| Do people have answers for your questions? |
| Do they feel comfortable with revealing their answers to you? |

### Questionnaire (from Chapter 4)

|  |  |
| --- | --- |
| **Checklist question** | **Is finished when …** |
| Have you got your privacy policy sorted out? | The PIA is written and checked against existing privacy policies, and any issues are thought about and resolved. Revised privacy notices are published or ready to go. |
| Have you chosen your mode and questionnaire tool? | You have created a draft questionnaire. |
| For electronic questionnaires only: Does your questionnaire work correctly from invitation to thank-you page? | At least one person who did not build the questionnaire has tested it on a variety of browsers and with typical assistive technology. |
| Can people from your defined group use your questionnaire? | You have completed usability testing with at least three people, amended the questionnaire accordingly, and usability tested again with different people. |

### Fieldwork (from Chapter 5)

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| **Checklist question** | | **Is finished when …** |
| Have you decided on whether or not you are offering any follow-up? | Your approach is decided and cross-checked with PIA. | |
| Have you run your pilot test? | Pilot test:   * Is run from start to finish * Responses are analyzed * Draft presentation or other method of communicating the results is sorted out.   Make sure that appropriate changes are made to the questionnaire. Changes to the goals and sampling method should also be considered and made as appropriate. | |

### Responses (from Chapter 6)

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| **Checklist question** | **Is finished when …** |
| Have you backed up your data and created a research log? | Trick question: this is never finished until your survey is completed in every detail. But if you haven’t even started—begin now. Do a backup and update the research log on every day when you make any changes to your data set. |
| Have you done basic data cleaning, such as redacting personal data and checking ranges? | You are sure that all follow-up actions have gone to whoever is doing them, and appropriate personal data is redacted. |
| Did you have to exclude any responses and why? | You know that all exclusions are documented in the research log. |
| Did you choose to do any weighting and why? | If you are weighting, the weights are applied and the details of what you did are in the research log. |
| Did you check that your responses were representative? | Answers to the representativeness questions are checked and look acceptably in line with the results you expected. |
| Have you paid appropriate attention to all open answers? | The bare minimum: You have read and thought about every answer. After that, it depends on your goals, so you may have decided to:   * Send answers to whoever can take action * Smooth and group answers to make them appropriate for numerical analysis * Code one or more aspects of the answers into categories * Do some combination of the above, or something else |
| Did you find anything out that surprised you or that was unexpected? | One of the reasons that we do research of any kind is to learn things that we did not already know. There’s almost always something surprising or unexpected: when you find it, you’ll know that you have looked hard enough at your responses. |

### Reports (from Chapter 7)

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| **Checklist question** | **Is finished when …** |
| What did you find out compared to your goals? | You have thought about what your responses told you and what you hoped to learn and decided on the extent to which you have learned what you hoped. |
| Did you use any descriptive statistics? | You chose to do a numeric method, so your report will have some numbers in it—and usually some descriptive statistics to help people who read the report to compare and use the numbers. |
| How did you communicate the results? | You have chosen an appropriate reporting method, or several of them because there are groups of stakeholders with different interests, and you have checked that the people who got the report considered that it is accurate and useful. |
| Did you triangulate? | You have compared what you learned from this survey with any other data you already have and decided on the extent to which these results confirm, add to, or change earlier results. |

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