Using Evidence to Advance EDI: Considerations for EDI Surveys

Survey Planning Checklist

1. Deciding to Conduct a Survey

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| Purpose |  |
| What is the desired change that we hope to achieve, and how do we think running a survey will contribute to it? |  |
| What is our research question, or the specific question we hope the survey will answer? |  |
| Is the information we hope to gain from this survey available from other sources? |  |
| Scope |  |
| What is our sphere of influence? Do we have the capacity to take action in the areas we want the survey to address? |  |
| How will the results of this survey support us to take action? Be as specific as possible. |  |
| Considering our purposes in conducting this survey, do we need to seek approval from UBC's Behavioural Research Ethics Board (BREB)? |  |
| Project team |  |
| Who is involved in the decision of whether to run a survey? What perspectives and experiences are represented in our planning team? Is anyone missing? |  |
| How will we ensure that survey respondents and other people who will be impacted by the survey will be able to shape the project? |  |
| What power dynamics are important to keep in mind as we plan and implement our survey? How will we be attentive to them? |  |
| Capacity and expectations |  |
| Have there been previous surveys or other information gathering about EDI in our unit? How will this impact the expectations for our survey? |  |
| Do we have sufficient time, resources and appropriate skill to:   * plan and run the survey? * store the data securely and protect and personal information? * analyze and interpret quantitative and/or qualitative data? * report the results in a meaningful way? |  |
| Are we confident in our unit’s commitment and capacity to take action based on the findings? Does our unit have the resources, or know how to access resources, to take action based on the findings? |  |
| Will a typical survey response rate of between 10% and 50% (even when using targeted strategies) be sufficient for our purposes? What strategies will we take to increase our response rate? |  |
| Decision point |  |
| After considering our purpose, scope, team, capacity, and expectations, are we convinced that a survey is the appropriate tool? |  |

1. Survey approach

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| Topics |  |
| What topics do we need to address in this survey? What are our “must-knows”? |  |
| What topics will we add to a “parking lot” to hopefully be addressed another time? |  |
| Respondent experience |  |
| Who is our respondent pool? Who do we want to hear from? Which (if any) specific groups within our pool are we particularly interested in hearing from? |  |
| How long should the survey take to complete? What is a reasonable (and respectful) amount of time to ask our respondents to give to this project? |  |
| How will we ensure respondents feel respected and valued as they participate in our survey? |  |
| How will we protect respondents’ privacy and reduce the risk of harm during data collection? |  |

1. Survey questions

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| Survey preamble |  |
| How will we communicate to potential respondents the purposes of our survey and how we will use the results? |  |
| How will we communicate to potential respondents the risks or potential harm that may arise from completing this survey, including risks to privacy? How will we communicate about the steps we have taken to mitigate these risks? |  |
| How will we obtain consent from potential respondents? |  |
| Survey questions |  |
| How will each survey question support us to answer our research question or overarching question? |  |
| Will our mix of qualitative and quantitative questions support us to contextualize the survey results? |  |
| Do we need to ask demographic questions in order to answer our research question? |  |
| Do we intend to analyze survey questions in relation to demographic variables? Is this practical, given the number of respondents we expect? |  |
| Does our respondent pool have the information needed to answer our survey questions? |  |
| Do our survey questions use respectful and inclusive language? |  |
| How will we pre-test or pilot the survey before launching? |  |
| Survey logistics |  |
| How long will our survey be open for? |  |
| What strategies will we use to increase our response rate? |  |
| Final check |  |
| After considering the above questions, are we satisfied with our final selection of survey questions? |  |

1. Analysis, interpretation, and taking action

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| Analysis and interpretation |  |
| What power dynamics are important to consider as we analyze and interpret the data? |  |
| How will we protect respondents’ privacy during data analysis? |  |
| Who will be responsible for analyzing the data? How will decisions be made during the initial analysis phase? |  |
| How will we ensure diverse perspectives and experiences inform the data interpretation? |  |
| Taking action and closing the feedback loop |  |
| How will we share the results and our interpretation? With whom? |  |
| How will we ensure that action is taken as a result of what we learn? Who is responsible for this? |  |
| How will we communicate about the action that has been taken as a result of what we learn? |  |