

This document provides a general overview of considerations that need to be made when developing a survey in the context of a restoration project. You have likely entered this document thinking about planning for or monitoring a particular outcome (e.g. recreational fishing), however the method may be relevant for additional outcomes as well (e.g. environmental education, subsistence fishing, mental health). Make sure to consider additional outcomes relevant to your project context before distributing a particular survey so you can get as much information out of the effort as possible.

You will likely benefit from partnering with community groups when designing and distributing a survey. These partnerships will allow you to more effectively gather information from a representative group of community members about effects of changes in outcomes of interest. This includes (actual and perceived) benefits and unintended consequences of changes in target outcomes. Be mindful of and defer to the expertise of your community partners on how to best develop and distribute a survey. This can include allowing them to lead while you provide support as necessary.

## Background

Surveys are questionnaires that allow respondents to answer either using discrete choices or open-ended responses. Surveys in this context are meant to measure or evaluate respondents' relationship with or perception of a given project outcome.

### **If you are applying these methods at the planning stage of your project:**

Conducting a survey in advance of or at the outset of a project is useful for gauging what stakeholders care about with regard to potential outcomes of a project. This type of data collection can help a project set outcome goals with community input.

### **If you are applying these methods for monitoring a particular outcome:**

Surveys can be used as an outcome assessment tool for understanding how local community members understand, perceive, or are experiencing a particular project outcome through a structured set of questions. This type of data can help a project evaluate who is using or accessing certain aspects of a project, whether people like how project outcomes are being delivered, or their knowledge of a particular aspect of a project and its outcomes.

## Considerations for Surveys

This document focuses on equitable and ethical approaches to survey-based demographic data collection, survey design, and survey dissemination. Each individual [GEMS measurement protocol](#) that suggests survey integration offers tailored adjustments or additions in order to monitor outcomes.

When designing and distributing a survey it is important to get it approved by whatever entity oversees human subjects research for your organization. This is often an Institutional Review Board (IRB), but other oversight bodies may be relevant for certain organizations. This step is important to ensure that no harm will come to subjects through participating in a survey and that surveys follow ethics rules of the organization distributing it.

## Collecting respondent demographic information

Ensure that the survey questions are soliciting sufficient information regarding respondents' demographic characteristics. These types of questions may be considered personal or uncomfortable for respondents to answer. They should all be set as optional questions or include an option stating they "prefer not to answer," and should be worded carefully to prevent prompting respondents to exit or stop taking the survey. Recommendations for formatting sensitive questions can be found at [How to Ask Sensitive Survey Questions](#). Demographics questions can collect data on the following:

- Race and ethnicity
- Age
- Gender (include trans and non-binary options)
- Zip code or county of residence
- How long they have lived in [x] county
- Primary language
- Job / occupation (s)
- Annual household income
- Level of education completed
- Number of people in the household
  - Number of dependents
  - Number of working adults

For more information on designing questions for demographic data collection, refer to [Inclusive Demographic Data Collection](#) and the [American Community Survey](#).

## Ethical and equitable practices in survey design

At the start of a survey, there should be a clear statement of intent regarding the purpose of the survey, who is conducting the survey, where the information collected will go, and how it will be used. This statement should also include a confidentiality statement that ensures the respondent will not be put at risk by answering the survey, that their responses will remain confidential (e.g. any identifying information collected will not be used), that they are not obligated to answer any question, that they may end the survey at any time, and that there will not be a consequence for deciding not to answer a question or to end the survey early. All survey questions should either be optional or include an option such as "I prefer not to answer this question." Any survey must be vetted and approved or considered exempt by an [Institutional Review Board](#) (or other oversight body) of an institution implementing the survey.

Survey questions should be worded as clearly, concisely, and directly as possible. Multiple choice, numerical, or checklist responses will be easiest to analyze quantitatively. However, more specific responses and perspectives, especially regarding experience and values, will be best addressed through open-ended questions where respondents can write in their answers. These will require more in-depth qualitative analysis but can be very helpful in identifying differential effects of outcomes through respondent's experiences.

Sometimes surveys need to be conducted in or translated to other languages. During the [stakeholder assessment step](#), the project should identify whether or not there is a significant population who will not be able to or feel comfortable responding to the survey in English. For more information, refer to [Guidelines for Translating Surveys in Cross-Cultural Research](#).

## Consider the means of administering the survey and potential equity concerns

Consider how best to reach your entire project service area,<sup>1</sup> including historically underrepresented groups, using the survey. We recommend explicitly targeting demographic groups until response demographics are representative of population demographics surrounding the project site. Common methods for distributing a survey are below, and more than one can be used in any given survey implementation.

- **Web dispersal:** This provides the broadest possible reach and largest possible respondent group with a likely quick turnaround time. Through web platforms such as Qualtrics or Google Forms, results can be immediately downloaded as spreadsheets for data analysis. However, this requires that all respondents have internet access and a device (computer, tablet, smartphone, etc.), which may exclude lower income or older individuals. Additionally, it can be more difficult to target surveys to a specific population.
- **Via mail:** This allows you to target a specific region / area, such as every mailing address in a specific zip code. However, mail surveys tend to have a low response rate.
- **Via phone call or text message:** This requires that all respondents have an active phone number, and that you can access these numbers. It is becoming more and more common for people not to answer the phone for numbers they do not recognize, so texting might be a helpful way to initially engage respondents.
- **Intercept / in person at site:** This method tends to have the highest response rate, but requires significant human labor and time.

## Resources

- For more information on survey types and their respective advantages and disadvantages, refer to [Pew Research Center's Collecting Survey data page](#)
- For more information about the survey design process, please refer to this [presentation](#), [Principles of Survey Methodology](#). For information about ethical survey principles, refer to Olendick 2012, [Survey Research Ethics](#).
- Recommendations for formatting sensitive questions can be found at [How to Ask Sensitive Survey Questions](#).
- For more information on designing questions for demographic data collection, refer to [Inclusive Demographic Data Collection](#) and the [American Community Survey](#).
- [Guidelines for Translating Surveys in Cross-Cultural Research](#)

For more information on the GEMS project metrics and protocols, visit [this page](#).



<sup>1</sup> The geographic boundary containing those stakeholders for whom a particular project outcome is relevant