Observations on an expert review program for questionnaire evaluation

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Expert Evaluation of Questionnaires

Appraisal by survey research methodologists to identify potential problems

• Cognitive forms appraisal (Forsyth & Lessler, 1991)
• Comparison to other methods for problem detection (Willis, et al., 1999)
• Systems and frameworks
  – QAS-99: Question Appraisal System
  – QUAID: Question Understanding Aid
Questionnaire Surveys: the GAO Context

An independent, nonpartisan research agency of the U.S. Congress

- **Products** include financial and performance audits, policy analyses, investigations
- **Surveys** are typically one-time, specialty population, list-frame samples of individuals and establishments, using self-administered Web or fillable forms
- **Questionnaires** may collect financial, behavioral, autobiographical, or attitudinal data
GAO Peer Review Protocol

- **Purpose:** reduce error, technical review, consistency
- **Reviewers:** methodologists external to project
- **Timing:** before and/or during pretesting
- **Scope:**
  - Primary: instrument design – wording, order, visual design and layout
  - Secondary: respondent/subject characteristics, mode, burden and sensitivity
  - Excluded: research objective and justification, sampling, administration, estimation
Review Domains

- **Themes:** consistency, economy, clear visual design
- Format and visual design
- Introduction (and related communication)
- Instructions
- Navigation
- Questions (construction and wording)
- Answers
- Functionality (electronic)
Examples from Checklist

25. □ Visually separate nonsubstantive answer categories (such as “don’t know,” “not applicable”) from scale answers with lines, shading, or space, in check-one questions and matrixes.
Examples from Checklist

34. □ Question wording should accurately reflect and reinforce answer format. For example:
   34.1. □ Check-one questions: Ask “Which one of the following...” instead of “Which of the following...”
   34.2. □ Dates: When requesting a beginning date and end date that are to be recorded in two separate answer spaces, consider asking: “On what dates did X begin and end...” instead of “When did X take place?”
Reflections on the Protocol

• Reviews identify problems and result in changes
• Designers generally satisfied
• Reviews are variable
• Specificity of review – some designers report mismatch of expectations and actual
• Scope of review – some mismatch
Evaluating the Protocol

Assess nature and extent of variability between reviewers; quality and quantity of problems surfaced, and improvements resulting

• Compare across reviewers
• Compare across methods
• Measure costs: time, false positives
• Measure benefits: problems/solutions found, building awareness and design skills
Revising the Protocol

• Change scope of review?
• Increase standardization of review through training, resources, methods?
• Enable designers to request targeted feedback?