**How to use this checklist?**

This checklist can be used to ensure you have thought of everything and that during the development process you have made well-considered decisions. It is not compulsory that each item is scored with a ‘yes’; there may be good reasons for scoring ‘no’, or ‘more or less’.

If there is no good reason or well-considered basis for answering ‘no’ or ‘more or less’, then it is advised to consider modifying the questionnaire.

The checklist is an adaptation of the checklist in the handbook *Formulierenwijzer (Guide for making forms. In Dutch*)(Jansen et al., 1989)

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|  |  | Yes  More or less  No  Not applicable |
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**A. In general**

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| 1. | Does the completed questionnaire answer the research questions? | □ □ □ □ |
| 2. | Is the requested information restricted to what is necessary?  ⮚ Do not ask for information that is already known.  ⮚ Never include a question ‘because it might be interesting’. | □ □ □ □ |
| 3. | Is sufficient general information provided about the questionnaire’s purpose? | □ □ □ □ |
| 4. | Does the advance letter or introduction to the questionnaire provide sufficient information about what is expected of the respondent? | □ □ □ □ |
| 5. | Does the questionnaire have a clear and inviting title?  ⮚ Questionnaires should have a title that is meaningful to respondents. | □ □ □ □ |
| 6. | Is the requested data easy to provide by the respondent? | □ □ □ □ |
| 7. | Has the questionnaire been tested with test respondents from the target population? | □ □ □ □ |

**B. Phrasing of questions**

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| 1. | Are all questions expressed in the form of a question?  ⮚ End each question with a question mark. | □ □ □ □ |
| 2. | Are all questions singular?  ⮚ Ask only one question at a time. Words such as ‘and’, ’or’, ‘because’ and ‘because of’ are often indicators that there is more than one question hidden in the question text. | □ □ □ □ |
| 3. | Are the questions unambiguous?  ⮚ Provide definitions of terms that could be interpreted differently or are unclear. | □ □ □ □ |
| 4. | Is it always clear to whom, what and which period the questions refer?  ⮚ If necessary provide reference periods.  ⮚ Choose a reference period that is relevant to the importance of the event – the less important an event, the shorter the reference period. | □ □ □ □ |
| 5. | Are the questions free of assumptions and neutral?  ⮚ Do not say: ‘As you know... ’.  ⮚ Ask balanced questions: “do you agree or disagree with…” | □ □ □ □ |
| 6. | Are double negatives avoided? | □ □ □ □ |
| 7. | Are the questions and sentences brief? | □ □ □ □ |
| 8. | Are the questions written in plain language?  ⮚ Choose short and everyday words.  ⮚ Be consistent in vocabulary.  ⮚ Do not use jargon or abstract terms.  ⮚ Phrase texts actively and positively. | □ □ □ □ |
| 9. | Are the questions easy to read out if the survey is interviewer administered?  ⮚ In CAPI and CATI surveys interviewer friendliness is also important. | □ □ □ □ |
| 10. | Are the spelling and punctuation used correctly? | □ □ □ □ |

**C. Response options**

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| 1. | Does the question make clear what kind of answer is expected? ⮚ The response options should fit the question. | □ □ □ □ |
| 2. | Are all possible response categories provided? ⮚ If necessary, include a catch-all category: “Other, that is: …”.  ⮚ Always put the catch-all category at the end of the list. ⮚ When presenting a list of possible options, put the most likely answer first.  ⮚ Explicitly include the response options ‘don’t know’ or ‘refuse’ when they are relevant responses. | □ □ □ □ |
| 3. | Are the response categories mutually exclusive? ⮚ Avoid overlap between the response options. | □ □ □ □ |
| 4. | Is the response scale balanced?  ⮚ When using scales, make sure that they are balanced, e.g. as many positive as negative options. | □ □ □ □ |
| 5. | Is the meaning of the response options clear? ⮚ Are the response options unambiguous? | □ □ □ □ |

**D. Explanations and instructions**

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| 1 | Are explanations and instructions given only where necessary? ⮚ The more text, the less likely that people will read it. | □ □ □ □ |
| 2. | Are the explanations and instructions located as near to the question as possible?  ⮚ Try to include instructions as much as possible in the question texts; keeping the previous point in mind.  ⮚ Do not “hide” instructions behind clickable buttons, or in separate appendices of the questionnaire. | □ □ □ □ |
| 3. | Are the explanations and instructions plain and clear?  ⮚ Keep sentences short.  ⮚ Beware of words such as ‘excluding’ and ‘not’; respondents tend to overlook this. | □ □ □ □ |
| 4. | Are hints provided as to where the relevant information can be found, if respondents have to look up information in order to be able to answer a question?  ⮚ Look up tasks are burdensome, try to make it as easy as possible for the respondent. | □ □ □ □ |

**E. Structure of the questionnaire**

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| 1. | Is the numbering of questions, blocks and pages clear and correct? | □ □ □ □ |
| 2. | Is the route through the questionnaire clear?   * An interviewer or respondent should always know the current position within the questionnaire. * The routing instructions should be unambiguous and clear. Take the respondent as much as possible by the hand. | □ □ □ □ |
| 3. | Are the questions clustered into recognizable themes (blocks)? ⮚ Each block deals with one defined theme or task. People work from task to task: structure the work in clearly defined subtasks.  ⮚ Give each block a clear separate title. | □ □ □ □ |
| 4. | Is the sequence of blocks logical for the respondent and also favourable for the response?  ⮚ Preferably ask about background characteristics last.  ⮚ Do not start a questionnaire with sensitive questions, nor with difficult questions. | □ □ □ □ |

**F. Design**

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| 1. | Is the chosen design functional?  ⮚ Any variation in layout, every symbol, etc. must have a function.  ⮚ Any symbol used in the questionnaire should be clear and explained if necessary. | □ □ □ □ |
| 2. | Is the chosen design applied consistently throughout the questionnaire?  ⮚ Layout, symbols, line spacing etc. must have the same meaning throughout the questionnaire.  ⮚ Always put the same kind of information in the same place and in the same style. | □ □ □ □ |
| 3. | Is the use of colours conscientious?  ⮚ Use contrasting colours as a complementary design feature.  ⮚ The use of colours should also be effectively for people with vision impairment. | □ □ □ □ |
| 4. | Does the design (visually) support the structure of the questionnaire?  ⮚ The design can make clear which items in a questionnaire belong together.  ⮚ Make sure that it is always clear which response box belongs to which question.  ⮚ Make sure that there is enough space for the respondent to write down his answer. | □ □ □ □ |
| 5. | Is any information which is not intended for the respondent (e.g. coding keys, respondent numbers) formatted less prominently?  ⮚ What respondents do not need to know, they do not need to see; it could also distract or confuse them. | □ □ □ □ |

**G. Specific points for Internet questionnaires**

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| 1. | Is it clear where and how the questionnaire can be downloaded, opened and sent?  ⮚ Make sure the web address is short and clear. Typing errors are easily made  ⮚ Keep the web page clear and surveyable.  ⮚ Does the respondent receive a confirmation of receipt after sending in the electronic questionnaire? | □ □ □ □ |
| 2. | Have the questionnaire programmers considered downward compatibility?  ⮚ Most people do not have the most up-to-date soft- or hardware; you want the electronic questionnaire to work for most browsers and software. | □ □ □ □ |
| 3. | Does the respondent always know his location within the questionnaire?  ⮚ The respondent must have a sense of being ‘in control’ .  ⮚ Make clearly visible which entry field is active.  ⮚ Ensure that the respondent is able to navigate conveniently.  ⮚ Provide a progress indicator.  ⮚ Make clear which screens and questions still have to be answered. | □ □ □ □ |
| 4. | Has optimal use been made of the electronic way of presenting the questionnaire?  ⮚ Is the routing through the questionnaire automated?  ⮚ Is there a back button for people who get stuck or want to return to a previous step?  ⮚ Does the program issue a warning if the respondent forgets to answer a relevant question or gives improbable answers?  ⮚ Are all calculations automated?  ⮚ Does the respondent receive a confirmation of receipt after sending in the electronic questionnaire? | □ □ □ □ |
| 5. | Does the respondent receive feedback for every action?  ⮚ Every action must have a visible effect. Avoid surprises for the respondent. | □ □ □ □ |
| 6. | Is scrolling avoided?  ⮚ Horizontal scrolling in particular is extremely undesirable.  ⮚ If scrolling is necessary, indicate that it is possible. A scroll bar alone is not always enough. | □ □ □ □ |
| 7. | Can any necessary explanation be displayed on the screen at the same time as the question and response options?  ⮚ Avoid a possible pop-up with explanations obscuring the question.  ⮚ Avoid respondents accidentally sending in the questionnaire before it is finished. | □ □ □ □ |

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| 8. | Are error messages understandable and clear?  ⮚ State as specifically as possible what the problem is and how it can be solved.  ⮚ An error message should not obscure the relevant question. | □ □ □ □ |
| 9. | Are the data saved while the questionnaire is being filled?  ⮚ The given responses should be saved while the questionnaire is being filled in. Mind the performance of the questionnaire programme, making back-ups takes time. Often it is not necessary to make a back-up after each response but only at specific intervals.  ⮚ Allow respondents to save a partly filled in questionnaire and to resume responding at a later time. | □ □ □ □ |
| 10. | For business surveys: Is it possible to print the questionnaire, before and after the questions are answered?  ⮚ In many cases there is more than one respondent for one business questionnaire. The contact person for the NSI will collect all the data from other colleagues on a paper version of the questionnaire before entering the data in the electronic version.  ⮚ Often business respondents want to have a paper print of the questionnaire for their paper archive. | □ □ □ □ |
| 11. | For business surveys: Is it possible to save an electronic copy of the questionnaire?  ⮚ Business respondents often not only want a paper copy, but also an electronic copy for their archives. | □ □ □ □ |
| 12. | Have the guidelines for Web Accessibility for people with impairments been taken into account?  ⮚ See [www.w3.org/WAI/](http://www.w3.org/WAI/) for information on Web Accessibility Initiative – Cooperation Framework for Guidance on Advanced Technologies, Evaluation Methodologies, and Research Agenda Setting to Support eAccessibility (WAI-ACT, European Commission Project, 7th Framework Programme, IST 287725) and their guidelines. | □ □ □ □ |