Questionnaire planning worksheet

Plan a questionnaire before you write it: goal, audience, mode, question list and a pretest log.

Questionnaire name

Who owns it

Date started

1. Your goal

Finish this sentence before you write a single question. If a question does not help you decide, cut it.

We will use the answers to decide...

What we need to learn (three things at most)

What we already know, so we will not ask it

2. Who answers

Who should answer

Who should not answer

How many answers we need, and how many people we will invite

How we will reach them (email list, link, QR code on a poster, paper at the desk)

3. Mode

Pick one mode and tick it. The same question can get different answers on paper, online and in an interview, so keep the mode the same if you want to compare rounds.

Mode	Works well when	Watch out for	Tick
Paper	People are in one room (a class, a waiting room, an event) or offline	Someone has to type the answers up; handwriting can be hard to read	
Online form	People are spread out, and you want answers in a sheet with no typing	People who rarely go online; you need a link, an email list or a QR code	
Phone or face to face	Questions need explaining, or people find forms hard to fill in	Takes staff time; people may answer to please the interviewer	

Mode chosen, and why

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4. Question list

One row per question. Every question needs a job: the decision or fact it feeds. The first two rows are examples; replace them.

#	Question	Its job	Answer type	Required	Keep or cut
1	*Which evenings could you come to a class?*	*Which nights to add*	*Checkboxes*	*Yes*	*Keep*
2	*What is the main thing that stops you coming more often?*	*What to fix first*	*Long text*	*No*	*Keep*
3					
4					
5					
6					
7					
8					
9					
10					
11					
12					

#	Question	Its job	Answer type	Required	Keep or cut
13					
14					
15					
16					
17					

Answer types: multiple choice (pick one), checkboxes (pick several), dropdown, rating or linear scale, short text, long text, number, date, email, ranking, matrix (a grid of rows and columns).

Check every question

- It asks about one thing, not two.
- It has no leading words and does not assume an answer.
- It gives a time frame where one matters ("in the past month").
- Its answer options do not overlap and cover everyone (add "Other" or "Does not apply").
- You would act on the answer. If not, cut it.

5. Order and length

Opening question (easy, quick, everyone can answer it)

Sections, in order (general before specific)

Personal questions (put them last and make them optional)

Introduction: who is asking, why, how long it takes, by when

Time to finish, measured in the pretest

6. Pretest log

Ask five people from your audience to fill it in while they think out loud. Write down every pause, reread, "it depends" and skipped question, then fix the question. The first row is an example.

Tester	Date	Q #	What happened	Fix
Sam (member)	*3 May*	*2*	*Paused, asked if cost counts*	*Added: cost, time, travel as examples*

Changes after the pretest, and whether we need a second round

7. Send and follow up

Send date

Reminder date (we send it ourselves)

Close date and time

Where the answers go (a sheet, an export, the team chat)

8. After it closes

Answers received, out of how many invited

The three main things we learned

What we decided (go back to the goal in section 1)

How we will share the results with the people who answered

Why pretest?

Pew Research Center: "Pretesting a survey is an essential step in the questionnaire design process." (Writing survey questions, https://www.pewresearch.org/writing-survey-questions/)

US Census Bureau: "Pretesting is critical to the identification of problems for both respondents and interviewers with regard to question content, order/context effects, skip instructions, and formatting." (Appendix A2, https://www.census.gov/about/policies/quality/standards/appendixa2.html)