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Foreword by Allen I. Kraut

Designing and Using Organizational Surveys

A Seven-Step Process



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Step Two: Developing a World-Class Survey

Ask a stupid question, get a stupid answer.

Unknown

This step deals with the second stage in the survey process—developing the content (the questions) of the survey instrument. Like good contracting, good item development and construction can have a profound and long-lasting impact on the success or failure of any survey effort. All the fancy statistical modeling and the dazzling presentation skills, replete with bells and whistles, in the world cannot mask an obviously flawed survey instrument. If the design is poor, the results and their interpretation are likely to be poor as well. Therefore, mastering the art and science of good, solid, logical survey construction is of paramount importance to any practitioner venturing forth in this arena.

This step concentrates on the design and development of a world-class survey tool. Through examples and descriptions of prior research and experience, the survey practitioner is guided on (1) using teamwork to build quality surveys, (2) gathering, identifying, and working through key issues that need to be assessed, (3) drafting a survey instrument, and (4) testing and refining it for final administration. By the end of this chapter, practitioners should have a better understanding of how to write items that are (1) specific,

(2) clear and concise, (3) free of jargon and other biases, (4) based on sound psychometric theory and research, and (5) appropriate for the respondents to whom they will be administered.

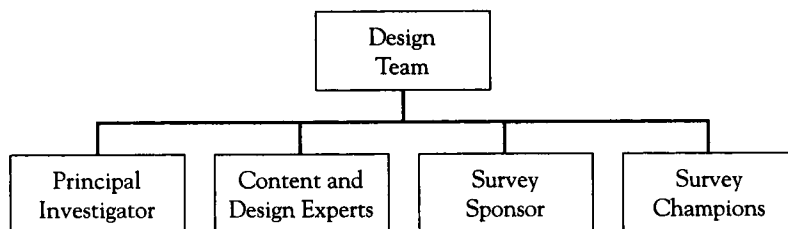
In addition to the issue of survey design and item writing, which is the main subject of this section, there is a fundamental question regarding instrumentation that must first be addressed in any survey effort: whether the survey team wants to use a standardized or existing tool or create a customized one of their own. We are assuming here that the survey team has chosen to create their own customized tool; however, this is not the only option. In fact, many organizations choose to use an existing instrument that has standardized, highly tested, well-used items that also have useful and relevant norms collected from other companies, industries, or groups. A custom-designed survey tool can include some questions, unmodified, that have been used in other settings for similar comparative analyses. But by its very nature, a freshly designed survey instrument cannot match a standardized product taken off the shelf with respect to the quality or quantity of external normative comparisons. Conversely, standardized tools, because of their applicability to a wide range of settings, are often unlikely to capture in enough depth or assess the specific nature of the information required in many organization survey efforts. Standard survey questionnaires can be very useful for comparison purposes (also known as external benchmarking) and can be cheaper and faster to implement, but they are not well suited to organizational survey efforts initiated in response to some significant and specific set of objectives. Examples are those resulting from a large-scale change effort or a merger or acquisition situation. And because most successful survey efforts do need to have specific goals and objectives to be effective, the utility of a standardized instrument is likely to be questionable in these situations. Even if the survey team decides to choose a standard product, the information contained in this chapter should be useful in evaluating the design quality of the products that are being reviewed for possible use.

Using a Survey Design Team

Developing a survey that is (1) successful in capturing or measuring what it is supposed to, (2) well received, and (3) actionable is not a simple task. To construct a survey that meets these criteria, it is often wise to convene or assemble a survey design team (Rea and Parker, 1992). In some instances this may be the same group as the survey team or task force mentioned in Step One for generating discussion about important issues to be assessed; in others this group may be an entirely different set of employees (for example, experts or experienced practitioners in the fields of survey item design and construction (see Figure 2.1). Because the purpose of this team is to design the core content of the survey instrument, a narrower set of skills than those required for the general project planning and testing phases is required.

The notion of a survey design team may bring to mind the phrase, "There is safety in numbers." However, the purpose here is really more appropriately reflected in the axiom, "Two heads are better than one." This group is not intended to serve as a means for diffusing responsibility. Instead, the design team's basic function is to create clear, easy-to-understand items for inclusion in the assessment instrument. This team is assembled by the principal survey investigator or sponsor for the sole purpose of item development. The survey design team should consist not only of technical and content experts

Figure 2.1. The Survey Design Team.



but of key players in the organization—high-potential employees, current and future opinion leaders, and so on. As emphasized in our discussion of the objective-setting process in Step One, a few strategically placed, highly visible, and credible members of management or senior leadership should be involved to help establish the importance of the survey initiative. However, because the design team is clearly more task-oriented than the basic planning group referred to earlier, it is often difficult to obtain any significant level of participation from senior-level individuals at this tactical level. A degree of balance is often needed between involving senior individuals in the planning and goal-setting phase and having their input in the item construction phase. This may, of course, be a somewhat less important issue in organizations where the CEO or the senior management board is the driving force behind the survey effort.

In any case, once a survey design team has been assembled and briefed as to the nature of the survey (for example, contractual arrangements regarding roles and deliverables, survey purpose and objectives, timeline for the roll-out process, key players and supporters, and cost constraints), item development can begin. The item development process should follow the series of five steps outlined next; each is described in greater detail in the next section.

1. *Gather* preliminary information about important issues.
2. *Identify* key issues by summarizing and integrating all available sources of information.
3. *Discuss* your findings with those who gave you input.
4. *Draft* the initial survey document based on your agreed-upon key issues.
5. *Pilot* the survey with your representative group and other organizational members.

Source: List adapted and expanded from Rea and Parker, 1992.

Gathering Preliminary Information

Many clients as well as practitioners have clear ideas about the types of issues and questions that they would like to see included in a survey. However, it is always best to gather information from a variety of sources before beginning any significant item-development work. As discussed in Step One, conducting focus groups with a cross-section of employees is often an excellent source for generating a list of issues, problems, and concerns that could be woven into a survey assessment tool.

Other tools that can be effective include individual interviews with various members of senior management or functional heads, minisurveys or questionnaires with write-in questions distributed to a small, select group of individuals, corporate communications and documents, articles written about the organization in the external media, as well as other types of archival data such as prior surveys, consulting reports, or planning projects previously completed. These latter sources of information can be useful in identifying consistent patterns or trends in the organization's development, but the most useful data are gathered in an open forum where issues, questions, and ideas can be discussed and debated. This is why focus groups are the most commonly used and appreciated technique for collecting this type of preliminary information for the purposes of survey development. Focus groups provide members of the survey design team with the opportunity to discuss in depth and probe possible survey items and issues with a representative sample of participants. Issues inherent in the process itself, such as concerns regarding confidentiality or the purpose and importance of the survey effort, can also be raised and therefore better dealt with in the communication and administration phases.

Identifying Key Issues

Once you have conducted your preliminary data gathering sessions (for example, through focus groups or interviews), it is time to begin the data synthesis process. You will probably begin to see initial patterns emerge in your preliminary data after your third or fourth data gathering session. Unless you already have a standard framework or guide for organizing the information obtained, such as the Burke-Litwin model (Burke and Litwin, 1992) or Nadler and Tushman's (1992) congruence model, these early patterns can be used to provide you with potential categories of issues or main themes for classifying and quantifying the data. Frameworks, whether preexisting or created on the spot, are important because they provide us with a way to view the world in an organized fashion. Through the use of such models it is also possible to identify linkages between issues and concepts, which in turn can be used for future initiatives and action planning (more on this in Steps Five and Six). You will need to have a clear and concise method for categorizing all the comments and perceptions you collect in this initial step of the development process.

For many consultants and survey practitioners the use of a simple 2×2 model is often an important diagnostic tool for working with such data. In this way, members of a survey team can present or work with complex data directly and easily. Figure 2.2 shows a sample of how data can be organized and presented using this simple dichotomous approach.

In this example, let us assume that Company XYZ is interested in undertaking a large-scale organizational survey of all employees to determine areas for change within the organization. Focus groups and interviews are then conducted with a cross-section of the organizational membership to identify the areas most in need of change and to assess the perceived difficulty in achieving this change.

The 2×2 model in Figure 2.2 provides a simple comparative framework for looking at all the issues raised during the data gathering effort. Based on the results displayed in the model, items in

the full employee survey would be best directed at the topics described in the "Long-Term Goals" and "Quick Gains" sections, as these areas represent content that is of high priority but can also be changed (either in the short or long term). The nature of the messages to be communicated to employees about the expected speed of action that will be taken as a result of the survey effort may temper the extent to which items reflecting quick gains are emphasized over those based on the more long-term goals. However, items reflecting the "Low Priority" section, although useful to include from the standpoint of having issues that can be actioned quickly, are not likely to have much impact because their importance is relatively low. Similarly, the issues noted in the "Not Likely to Change" section are, for the most part, best ignored in the survey because the assessment of opinions in these areas is only likely to raise expectations that will probably not be met for some time, given their relatively low priority and difficult nature. Members of the survey design team need to find some mechanism to identify the key issues that can be changed, as well as those that need to be changed in order to build a survey effort that will have significant and meaningful results for people.

Figure 2.2. Classic 2 × 2 Model: Summary of Interviews and Focus Groups for Company XYZ.

		High	Importance of Organizational Factors	Low
Ease of Change	Hard to Change	Long-Term Goals leadership policies and procedures unified culture	Not Likely to Change bureaucracy organizational structure salary	
	Easy to Change	Quick Gains technical training employee recognition flexible hours	Low Priority speed of corporate communication more social outings	

Discussing Your Findings

When you ask people for their advice, opinions, and ideas, they want to know that you have understood and appreciated what they had to say. From the perspective of survey design, this means you need to present the findings of your data gathering efforts not only to the survey sponsor but, at least in a summary form, to participants who provided you with input from the focus groups and interviews. Often this feedback loop affords an opportunity to verify that the issues you think are important and deserving of item content, based on your synthesis of the results, are the same ones that others want to see reflected in the survey instrument.

A written report that summarizes your key findings is often a good approach to take. The format of this report can be based on a simple categorical approach, similar to the one just described, that serves to prioritize key issues along a set of dimensions (for example, high to low importance, positive versus negative change, high

Exhibit 2.1. Sample Memo to Survey Sponsor.

To: Mai Client
From: The Principal Investigator of the XYZ Survey Team
RE: Key Issues

Dear Mai,

I hope everything is going well. I am enclosing a brief synthesis of the key issues on which to concentrate in our survey identified by the XYZ Survey Team, based on our recent interviews and focus groups conducted in your organization. Please review these findings to see if they coincide with your assessment of the key issues for your organization. We would like to incorporate these into our draft version of the survey.

If you have any questions or comments regarding our findings, please call.

to low degree of changeability), or it can be based on a more structured approach along the lines of the classic OD technique of content coding responses. The data collected in this initial gathering step should be presented in a clear manner that highlights the issues the survey design team have found to be the most important. Exhibit 2.1 shows a sample memo.

Here is a synthesis of some key issues based on a series of employee focus groups, which is a good example of this type of approach.

Focus Group Questions

What are the barriers and hindrances you experience in your work?

What is exciting about your work?

Focus Group Participants

Two hundred Company XYZ employees from all levels, functions, and locations within the organization

Barriers to Work

- Poor work-life balance. (120 responses)
 - I'd like more balance between work and personal life.
 - I wish I had more time to spend with my family.
 - Workload.
 - Lack of support for home life.
- Lack of team focus. (98 responses)
 - Bureaucratic process, no team emphasis.
 - Not a lot of teamwork and coordination.
 - Lack of coordination between departments.

Exciting About Work

- I like the people. (133 responses)
 - Bright, energetic, creative.

Personal relationships.

Working with people.

- Nature of work. (99 responses)

It's different every day.

The work we do is important.

Nature of the projects; I feel very fortunate.

- Given freedom and autonomy. (22 responses)

Like running my own program.

Like to be managed loosely.

Drafting the Initial Survey Document

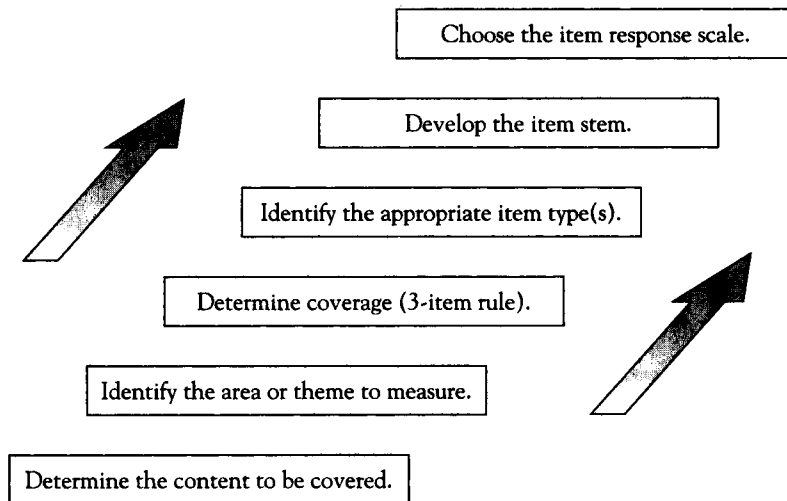
The next step in the survey design sequence is the drafting of the survey pilot instrument. This is easily the most complicated and labor-intensive phase of survey development. Figure 2.3 provides an overview of the basic steps involved in the process. Almost anyone can formulate a simple question to ask, but not everyone can write a valid and reliable survey item. There is much more to developing the contents of a survey questionnaire than simply writing items, many of which will be covered in more detail below.

It is necessary to the success of the survey effort that the design team, in conjunction with the client, sponsor, or end user of the survey results, spend time at the outset defining some of the more general parameters of the item-writing process before drafting begins. Key questions to consider here include

What is the maximum number of items we want to have in the survey?

Should the questions all use the same scale or a variety of different ones?

Are one or two items enough to cover main topic areas or do there need to be more?

Figure 2.3. The Item Construction Process Map.

Should the survey be short and densely packed or well spaced and easy to read?

By clarifying and delineating at the start many of these types of parameters for the survey instrument in terms of content and presentation, it will help all parties involved, including the survey design team, achieve greater clarity about the end product they are working to achieve. Much like good contracting, defining the look and feel of the survey early on and with significant specificity can save a great deal of heartache and unmet expectations later in the process. The remainder of this section details the pros and cons of the wide range of options for survey design, layout, item construction, and response formats.

Survey Length

As a former consulting colleague of ours was fond of saying, "Size isn't everything." However, when it comes to survey development, the size or length of the assessment instrument is indeed an important consideration. The objective of the survey design team is to

formulate a questionnaire that is (1) long enough to capture all the essential content elements that need to be measured but (2) not so long as to increase the likelihood that respondents will be intimidated by its size and hence fail to complete it or complete it with reduced accuracy.

The possible range is unlimited. We have seen surveys, for example, ranging from only 4 or 5 questions to over 250 items. Although there is no magic number when it comes to determining the appropriate length of an organizational survey instrument, 80 to 100 items (not including respondent demographics) is generally an adequate number of questions for most purposes (Paul and Bracken, 1995). In our experience across a number of different organizational settings, both public and private, a survey instrument should contain up to but no more than 150 content-related items in total. This tends to err slightly on the side of increased numbers of data points while increasing slightly the burden on respondents. However, in practice we have found it to be an effective limit in terms of both the level and quality of data received, as well as psychologically, when working with clients and trying to meet their demands. It is often the case that if given a choice, the survey sponsor would want to include enough questions to thoroughly alienate the entire respondent population; sponsors usually favor collecting every last bit of detail or asking the same question seven different ways.

Despite these general guidelines, when determining the appropriate length of a survey instrument, it is best to consider a number of factors in combination, including

- The goals and objectives of the survey effort
- The background characteristics of the respondent group
- The budget for the assessment project
- The method of survey administration (see Step Four)
- The type and format of the items of interest
- Expected turnaround

Remember that the goal of the survey construction process is to design a tool that is both concise and comprehensive (Edwards, Thomas, Rosenfeld, and Booth-Kewley, 1997). Table 2.1 provides an overview of some of the potential differences between a "shorter" survey effort and a substantially "longer" one for each of the factors listed. Any combination of the factors listed can be considered when designing a survey instrument; those in Table 2.1 provide some general preferences based solely on survey size.

Number of Items Per Content Area

Another issue to consider when designing a survey instrument is the number of items assigned to measure each content or topic area (for example, leadership, communication, and employee satisfaction). A good and often-used rule of thumb with respect to this issue is three to five questions of coverage per concept or theme. The thinking behind this simple formula is that each content area should be asked from several different vantage points to ensure complete coverage.

Here is an example. The items presented in Table 2.2 were designed to measure the degree of teamwork experienced by employees in Company XYZ. As you can see, the questions assess the level of teamwork at the organizational, business unit, and individual

Table 2.1. Potential Differences Between Characteristics in Shorter and Longer Survey Efforts.

80 Items or More					
Goals	Group Membership	Budget	Method	Type of Item	Expected Turnaround
In-depth survey	Non-managers	Larger	Paper or computer	Close-ended	Ample time
Fewer than 80 Items					
Quick assessment	Managers	Smaller	Interview or voice response	Open-ended	Little time

Table 2.2. Sample Items to Assess Teamwork in Company XYZ.

To what extent does the Company XYZ culture foster teamwork?					
1	2	3	4	5	DK*
Culture does not foster teamwork.				Culture fosters teamwork.	
To what extent is there an integrated culture among the business units in Company XYZ (that is, a unified approach to accomplishing work)?					
1	2	3	4	5	DK
Culture is poorly integrated.				Culture is highly integrated.	
To what extent do work group members cooperate in accomplishing work?					
1	2	3	4	5	DK
Work group members work individually, without much interaction or cooperation.				Work group members rely on each other and collaborate to get the job done.	

*DK = Don't Know

work group levels. By including items that access this concept at each of these levels, the data collected will provide the practitioner with a better understanding of the specific nature of teamwork in Company XYZ.

In most surveys, having more than five questions on a specific concept borders on redundancy. Having too many questions on the same topic, unless these represent distinctly different facets of behavior such as the broader area of managerial behavior, runs the risk of unnecessarily increasing response burden as well as potentially irritating respondents. Even if the items are well dispersed throughout the survey instrument, respondents are likely to identify those appearing to assess the same construct. They often point this out to survey practitioners, even when the items are intended to assess

more subtle differences in perspective. Shown next is an example of four different items that were intended to measure different facets of motivation but probably represent too much overlap in content:

1. To what extent are employees motivated in Company XYZ?
2. How motivated do you feel in your job?
3. How motivated are you to do your job well?
4. To what extent do managers motivate employees?

Of course, the questions may be too similar in focus, but it is possible that employees will rate these items somewhat differently (a hypothesis that can be tested during the pilot phase of the design process) or that the survey sponsor may want to include all these items, regardless of the amount of overlap, for other reasons. For example, the message communicated in the inclusion of four separate items assessing employee motivation might be important.

Two Types of Survey Items

Survey items, like people, come in many different shapes and sizes. They can be long (wordy) or short (simple). They can be qualitative or quantitative in nature. They can be designed to assess facts or attitudes. They can be measured on nominal, ordinal, or interval-level scales. They can ask how you feel or how other employees feel about a given topic. However, all survey items must fit into two categories; they must be either *open-ended* or *close-ended* questions (Edwards and others, 1997; Fink, 1995; Rogelberg and Waclawski, 2001). Each of these item types has advantages and disadvantages associated with its use.

Open-Ended or Write-In Questions

Open-ended or write-in questions ask survey respondents to provide an answer to a given question in their own words. These types of questions do not have a limited range of responses; their boundaries

are defined solely by the respondents themselves and are similar to the essay questions found in many school examinations.

Here are some examples of typical open-ended survey items reflecting different types of content:

1. How long have you been at Company XYZ?
2. How clear are employees about the mission of Company XYZ?
3. To what extent does Company XYZ value its employees?

Question 1 is designed to elicit a simple numerical response; questions 2 and 3 are more general in nature and could result in a variety of responses. There are several significant benefits of open-ended questions:

- They are less sterile or flat than close-ended questions; they can enrich and enlighten one's understanding of the data by adding a more descriptive human element.
- People can answer these types of questions from their own unique perspective instead of being forced into the response options that are driven by the paradigm of the survey practitioner or design team. In this way they allow for more individuality and expansiveness on the part of the respondent.
- They allow people the opportunity to let off steam, thus are an effective avenue for catharsis.
- Last and perhaps most important is that these types of questions allow respondents to answer in their own words (Edwards and others, 1997).

Because of the complexity of analyzing and standardizing the responses obtained from open-ended questions, it is generally considered good industry practice to use them sparingly and in conjunction

with a number of close-ended items. In fact, some practitioners recommend that organizational surveys contain easy-to-read, close-ended items wherever possible (Rea and Parker, 1992). We think this recommendation is a bit too strong. In our view, a well-conceived and constructed survey instrument should include a balanced complement of both these basic item types.

Although open-ended questions can and do provide the survey practitioner with rich data, which can lead to a better, more in-depth understanding of respondents' issues and concerns, they do have several serious limitations that should be recognized and factored in when constructing and implementing an organizational survey tool. The main disadvantages of the open-ended format include the following:

- The time required on the part of respondents for completion is considerably longer.
- They are much more time consuming for the practitioner or survey task force to content code and analyze.
- By their unstructured nature they have a tendency to produce redundant or extraneous information.
- They rarely assess the level of intensity of a given issue, feeling, or concern.

Close-Ended Questions

The other basic type of survey question is the close-ended question. Close-ended items, the most popular of formats, by design present a question and a limited number of options from which respondents must make one or more choices. Examples can be found on any true-false or multiple-choice test.

Table 2.3 lists examples of close-ended survey items. It should be apparent to the reader that even though these same questions were asked in the open-ended example, the quality and quantity of

Table 2.3. Sample Close-Ended Questions.

1. How long have you been at Company XYZ?					
01	Less than 1 year				
02	1–5 years				
03	6–10 years				
04	11–15 years				
05	16 years or more				
2. How clear are employees about the mission of Company XYZ?					
1	2	3	4	5	DK
Not clear	Moderately clear			Very clear	
3. To what extent does Company XYZ value its employees?					
1	2	3	4	5	DK
To no extent	To a moderate extent			To a very great extent	

information that can be obtained from the close-ended format is very different. Responses to question 1 would probably be very similar; questions 2 and 3 in this format would produce a very different type of information than might be collected when used in a write-in method.

A number of benefits of close-ended questions make them particularly useful for survey practitioners:

- They are fast and easy for the respondent to answer.
- They provide data that are easy to understand and interpret.
- They ensure uniform responses across respondents in different functions, areas, and even organizations, thus making comparisons simple and efficient.
- They provide the respondent with helpful memory cues to facilitate some sort of response.

- They can remind respondents of ideas or potential options that were unknown or forgotten (Edwards and others, 1997; Rea and Parker, 1992).

Of course, the close-ended format has its disadvantages as well. For example:

- The questions chosen to be included in the survey instrument may not be representative of people's attitudes and opinions regarding a certain content area.
- These types of items compel respondents to express attitudes, even if they truly do not have them.
- The response options provided may not reflect the full range of needs or opinions.

Despite these problems, however, close-ended items are extremely popular in organizational assessment survey efforts.

Types of Close-Ended Questions: Measurement Scales

Three levels of measurement are available to the survey practitioner when working with close-ended items: categorical-nominal, ordinal, and interval (Fink, 1995; Rea and Parker, 1992). Each of these levels provides a different type of data, and each is useful to the survey design team in grouping specific sets of items or variables in a particular way. The various properties of these levels are described next in order of increasing complexity.

Categorical-Nominal Variables

Categorical or nominal variables, the most basic type of close-ended questions, include items such as gender, ethnicity, religion, political party membership, prior exposure to a survey effort, and so on. Questions like these can be broken down into discrete *categories* or groups in order to determine the relative frequency of each response. These

categories are often arbitrarily labeled by the survey practitioner in a numerical fashion. However, since the data collected from these types of items do not inherently possess differences in magnitude or size, the assigned numerical values on a questionnaire, for example, would be for identification purposes only. There is no implied difference in valuation. By attaching numerical values to these types of variables, however, survey practitioners are able to take nonnumerical concepts and measure them quantitatively in the form of the frequency of responses selected.

As you can see in the following example, the numerical system assigned to gender is for descriptive purposes only.

What is your gender?

1. Female
2. Male

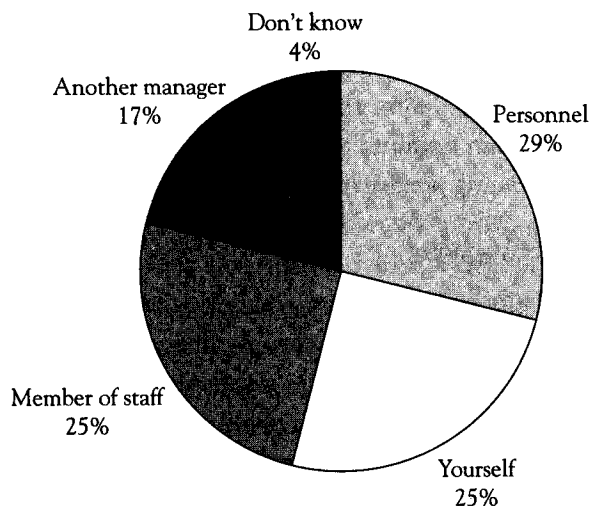
Although gender is a relatively simple example, a more complex version of this type of item, yet one that provides important information none the less, is displayed in Figure 2.4.

The only real limitation with nominal-level items, although it is significant, is that because the data collected do not really reflect a numerical relationship, the data are somewhat more limited with respect to the types of statistical techniques and analyses that can be used.

Ordinal Variables

Ordinal-level variables have response options that differ in magnitude or size but are not exactly and proportionally different from each other. In effect, these variables are used for ranking different *ranges* or *groupings*. Some of the most common examples of ordinal-level items found on organizational surveys are such factors as educational level, supervisory status, and grade level. In fact, survey instruments tend to have more ordinal measures than any other type (Fink, 1995).

Figure 2.4. Responses to Categorical Survey Question Regarding Employees' Understanding of Other Individuals or Groups That Hold a Record of Their Performance Appraisal.



Note: Percentages are based on total number of choices selected and are not forced to be mutually exclusive.

A scale that measures the extent to which a condition is present or absent, for example, is an ordinal-level item. This type of item is used when there are clear differences expected in the relative magnitude of the construct being measured on the survey, but it is not possible to specify whether these differences are absolute. Let us consider the construct of empowerment.

To what extent are you empowered to do your job as you see fit?

1	2	3	4	5	DK
To no extent		To a moderate extent		To a very great extent	

Most people would agree that there are likely to be differences in the extent to which employees feel empowered to do their jobs effectively. Most would also agree that these differences in perceptions of the level of empowerment experienced simply cannot be measured

as accurately as individual differences in height, weight, or age. Even in organizations with highly rigid and autocratic cultures, it is unlikely that *no* level of empowerment at all is experienced; it is probably just limited or infrequent. For these very reasons ordinal-level items are often used for measuring social-psychological constructs or phenomena because they allow the survey practitioner a greater degree of specificity than nominal categorical scales but do not make the mistake of assuming precise or absolute differences.

Interval-Numerical Variables

The final type of close-ended question that can be developed for a survey instrument is the interval or numeric item. An interval-level variable provides the survey practitioner with the most precise type of measure available to an organizational survey. Questions designed according to these standards are used when a precise difference can be assessed among discrete scale points or anchors. Some of the most frequently used examples of interval scales are age, tenure, income, height, weight, IQ, and temperature, simply because the range of options can be designed to be equidistant from one another (for example, in five-year blocks).

Length of service in Company XYZ:

- a. 1 to 5 years
- b. 6 to 10 years
- c. 11 to 15 years
- d. 16 to 20 years
- e. 21 to 25 years
- f. 26 to 30 years

Types of Close-Ended Scales: Summary

Ordinal-level items are the most frequently used of the three close-ended measurement scale types in organizational survey instruments. The popularity of these types of scales derives largely from

the latitude they provide survey practitioners in developing items. They are also favored because of the limitless possibilities they provide in terms of response scale options. There are a great many options for these types of items. Table 2.4 provides an overview of just a few of the more commonly used response categories on organizational survey instruments.

How Many Response Options?

Each of the scales detailed in Table 2.4 consists of five points, anchors, or response options, but survey scales of this type can range from as few as two points to as many as needed to provide a meaningful degree of discrimination. Some questions might warrant a simple set of options such as agree, disagree, or neutral; others such as the empowerment example are best measured using a more graduated set of options, ranging in magnitude.

In practice, organization assessment survey items usually provide 5-, 7-, or 9-point options (Fink, 1995), particularly when they have been designed to assess more intangible organizational, behavioral, or social-psychological content (for example, the quality of senior leadership, the degree of responsiveness to the external environment, the usefulness of corporate information mechanisms)—the primary concern of most survey efforts. Scales can consist of even-numbered anchors (for example, 4, 6, and 8 points) as well, but these types of items are less common in practice because they do not allow for the possibility of a neutral midpoint, particularly in items with scales that are bipolar in nature (described in more detail in the next section).

Some survey practitioners prefer to use these types of even scales to artificially force respondents to make a positive or negative selection (in items with bipolar scales) or at least in the direction of more or less (in items with a single unipolar extent or magnitude scale) because they feel that it provides more poignant data. Although many practitioners and researchers have examined the effects of scale length in more general contexts, with decidedly mixed conclusions

Table 2.4. Types of Response Options.

	1	2	3	4	5
Endorsement	definitely false	false	don't know	true	definitely true
Frequency	never	almost never	sometimes	very often	always
Intensity	none	very mild	mild	moderate	severe
Influence	no problem	very small problem	small problem	moderate problem	big problem
Comparison	much less than others	somewhat less than others	about the same as others	somewhat more than others	much more than others
Satisfaction	very dissatisfied	dissatisfied	neutral	satisfied	very satisfied
Effectiveness	very ineffective	ineffective	neutral	effective	very effective
Quality	very poor	poor	average	good	very good
Expectancy	much worse than expected	worse than expected	as expected	better than expected	much better than expected
Extent	to no extent	to a small extent	to a moderate extent	to a great extent	to a very great extent
Agreement	strongly disagree	disagree	neutral	agree	strongly agree

Source: Adapted from Edwards and others, 1997, and Fink, 1995.

(for example, Edwards and others, 1997; Schuman and Presser, 1996), we have found in our work that 5-point scales may indeed be the best overall, based on analyses of differential level (mean) and shape (variability) effects among the same instrument using 4-, 5-, and 7-point scales in an organizational setting (Church and Waclawski, 2000). However, this process adds a level of response bias to the process that cannot be removed in subsequent examination and analyses, which could in turn lead to more spurious findings and recommendations. It is always possible, for example, to explore what would happen to the data if the respondents who chose the midpoint were simply removed on an item-by-item basis during the analysis phase. The practitioner should try to remember that although too much information can always be reduced, it can never be expanded. This is one reason an early initial meeting with the survey design team and the survey sponsor to define the working parameters and expectations of the survey instrument is an important first step in the design process.

Unipolar Versus Bipolar Response Options

Besides the total number of response options offered, another issue in survey item construction concerns whether or not the questions will be rated using a unipolar or bipolar scale. Unipolar response scales are those in which the response can range solely in the relative degree of magnitude of the given statement or phenomenon. Examples of these include extent scales (for example, "the extent to which employees feel empowered in their jobs") as well as frequency scales. Any item that ranges from nothing to something represents a type of unipolar assessment. Conversely, a bipolar-response-scaled item provides the survey respondent with two different options that can vary in meaning on either end of the scale. Agree-disagree scales are a good example of this type of scale. Neither option is necessarily better than the other, but unipolar scales provide the respondent with a greater range of subtlety in terms of response options, whereas a bipolar scale limits the degree of options by adding a more specific level of detail to the data.

Two sample scales are provided in the following example that highlight some of the differences between these response options:

My business unit has clear-cut goals.

<i>Unipolar scale</i>	<i>Bipolar scale</i>
1 To no extent	1 Strongly disagree
2 To a little extent	2 Disagree
3 To some extent	3 Neither agree nor disagree/ neutral
4 To a great extent	4 Agree
5 To a very great extent	5 Strongly agree

If the respondent were to agree with this statement, four levels of extent are available on the unipolar scale but only two options on the bipolar scale. If the respondent were to disagree with the statement, there is only one option on the extent scale, and that does not directly assess the level of disagreement. But the two clear choices on the bipolar scale would more accurately reflect an opinion. In the end, the best choice regarding these response scale types is made based on the nature of the content being assessed (for example, does the survey team care about relative presence of the phenomenon in the workplace or whether or not the idea elicits a positive or negative opinion) in the survey instrument and the ease and relevance with which these different approaches fit the questions being asked.

Guidelines for Survey Construction

Having obtained a solid understanding of the differences among the various types of items and response scales that can be used, it is now time to turn to some basic rules of thumb with respect to survey item construction. These generally agreed-on principles apply to all types of items and to all survey efforts. Practitioners and their survey de-

sign teams should keep these in mind when developing their instruments (Edwards and others, 1997; Fink, 1995; Jones and Bearley, 1995; Rogelberg and Wacławski, 2001). A brief synopsis of these principles is presented here.

PRINCIPLE 1: Keep the Issues in Mind.

One of the pitfalls or unexpected negative side effects of using a survey development team is the tendency for people to become fixated on their own beliefs or values about the necessity of certain survey items that, in reality, may or may not be appropriate to the assessment effort. Team members often have such a vested interest in pursuing issues that they personally believe to be important that even when confronted with the question of relevancy, they continue to promote their item agenda. If taken too far, a survey instrument can quickly become overly long, unwieldy, and off-target due to such pressures. Although this outcome may not have been the intention of the members of the survey design team when advocating for their issue, it can easily be the end result. To a large extent having a conceptual framework such as the Burke-Litwin model (Burke and Litwin, 1992) surrounding the design and analysis process or a thorough examination of the preliminary data can help the survey practitioner reduce this risk.

Another force that can affect the aim of the group is the intra-group process itself (Schein, 1988). Sometimes a bad group process can quickly undermine even the best strategy or integrated organization development framework, resulting in a survey instrument that has been designed by a committee rather than by a team. Therefore, when the team is engaged in developing survey items, it is often a good idea to have one of the members take responsibility for monitoring the group process and progress (to serve as a process consultant [Schein, 1988]) to help the team stay on course. This means keeping track of what the key issues are for the organization and

goals of the survey effort, and making sure that individual members of the development team do not deviate too far from these objectives in pursuit of their own personal agenda.

In the end, what you ask for is what you get. The practitioner must never forget that once the heat of the moment has passed and the data have been collected, there is no turning back to fix a bad item or add one last item that was dropped in favor of something else. Remembering the needs and wants of the survey sponsor and keeping these in mind should be foremost in the thoughts of the survey design team.

PRINCIPLE 2: Be Parsimonious.

This principle is related to the comments made earlier regarding the appropriate number of items needed to measure a given construct or issue. Use enough items to measure what you need on a given topic, but no more. As previously mentioned, one rule of thumb for the total length of the survey instrument is somewhere between eighty and one hundred items (Paul and Bracken, 1995). Many topics may be of interest, but if they are not necessary to the goals and objectives of the survey initiative, the design team needs to seriously consider deleting them or saving them for a future assessment. These days more than ever, time is a precious commodity for people in organizations, and they do not look favorably on people who waste theirs. When a survey is perceived as being too lengthy and time consuming, it can create not only a negative opinion of the survey but of the corporate initiative to which it has been tied, the usefulness of surveys in general, and even the company as a whole. In addition, we have heard many people in organizations say that they are feeling "surveyed to death" these days. Remember that *your* assessment tool is probably not the only one they are being asked to complete. It is good survey practice to take this into account when constructing and administering your instrument.

PRINCIPLE 3: Avoid Double-Barreling.

It is necessary not only to keep the survey relatively short and simple but to make sure that the items themselves are clear and uncomplicated. One of the most common mistakes in item construction is attempting to measure more than one idea at a time—commonly referred to as double-barreling. Most survey practitioners at one time or another have used questions of this nature, even though it is probably the biggest survey no-no in the book. Double-barreled items are usually the result of an effort to reach a design compromise or get the biggest bang for a buck in terms of the total number of concepts measured in the survey. The interpretation of the data collected using this type of item is uncertain at best and may prove relatively useless and unsatisfying. However, in some cases the data gathered from this type of item are not as much of a problem in analysis, particularly when the assessment in question is highly attitudinal in nature from the start. Again, these types of problematic items can often be avoided through group process checks, quality control, and appropriate attention to the pilot testing process. It also helps to have an objective third party proofread your items, particularly with regard to this issue.

Here are examples of commonly used items that seek to measure more than one construct:

To what extent are you satisfied with your salary and benefits?

To what extent do employees support the mission and vision of Company XYZ?

To what extent does your manager earn the trust and respect of employees?

To what extent does your manager coach and mentor people in new assignments?

The concepts presented are similar in each of these sample items (for example, between mission and vision in question 1 or trust and

respect in question 3), but they are not the same. Because of politics and personal agendas, however, the use of these types of questions is commonplace. These items should be used sparingly, if at all.

PRINCIPLE 4: Be Clear and Concise.

It is better to be clear and concise with a survey item than long-winded and obtuse—simple enough in concept but difficult to accomplish in practice. Words and phrases that are clear to one person or group are often obscure or out of context to another.

Consider carefully and understand the respondent group or audience that will ultimately be surveyed when developing survey items. Factors such as the target group's educational background, reading level, and whether or not English is a first or second language must be taken into account. The best practice is to develop individual survey items with the lowest common denominator in mind. Making the items clear and simple will ensure greater readability and a more favorable translation into other languages if necessary. Practitioners should avoid the use of esoteric or uncommon words or expressions. In this way you can increase the likelihood that the majority of the survey respondent group will have little or no difficulty in completing the survey. A good way to combat threats to readability and the likelihood of inappropriate language is to test the survey with a diverse group. Outside proofreaders are also recommended.

Similarly, the use of jargon in surveys or questionnaires should be avoided when possible. In particular, jargon that is culturally specific to a nation, an industry, or an ethnicity can be confusing and frustrating to people of different backgrounds. For instance, instead of asking, "To what extent do team members work toward win-win solutions?" one should ask, "To what extent do team members work toward mutually satisfying outcomes?" Likewise, rather than trying to measure the "value-added" of an intervention or approach, it is probably better to measure its "contribution."

Another source of confusion is negatively worded items. An example of this would be, "To what extent are employees demotivated to do their jobs effectively?" We have heard many practitioners and survey sponsors advocate the inclusion of a few of these types of items because they think the change in format will make respondents really think about their answer. However, in our experience these types of questions represent a significant source of confusion and frustration. They are difficult for respondents to rate and are equally difficult to describe when working with the survey feedback. At the very least they must be reverse-scored for analysis purposes, which assumes that the scale in reverse is comparable to the other scales used in the survey in their original form. When these types of items are used only a few times in a survey instrument, they often go unnoticed by respondents who have a certain response in mind, based largely on the understanding of the response scales used throughout the rest of the instrument. Because of this, participants respond in a manner exactly opposite to what they had intended. These items often have to be removed from the final reporting process because they are potentially invalid and difficult to work with.

Unfortunately, it is not always easy to be clear and concise in one's item writing style, nor is it simple to assess the quality of an instrument by oneself. For example, we were in a client meeting discussing our progress on a new survey draft. One of the participants, who was not one of the survey design team members, voiced her concern that there was too much ambiguity in some of the items. After the meeting was over, the survey team reconvened without this person and debriefed the meeting. We were all wondering what had happened. At the time of their initial construction, the items had seemed perfectly clear to us. We had spent so much time and effort working together, participatively and supportively, to craft the items contained in this new draft that we thought we had achieved synergy and a sense of team spirit. Instead we had obviously confused and disappointed this person. After some discussion someone

in the group chimed in, "Well, you know what they say. A camel is a horse created by a committee." This brings us back to the idea that sometimes groups working together can fall prey to their own ineffective processes. In the spirit of collaboration and everyone putting in their two cents worth, we created a draft survey instrument that to this outside reader was unclear and muddled. As a result, we had to review the entire questionnaire and its relationship to the project objectives. Then we had to examine the individual items piece by piece to make sure that each of the issues assessed was clearly worded and distinct from one another.

PRINCIPLE 5: Avoid Leading and Biased Questions.

This might seem like common sense, but remember to avoid constructing survey items that are either overly leading or biased toward a certain response by design. Survey items should provide an appropriate range of options, and the wording of the item itself should be made to be as free of value judgments as possible. The inherent interests of the survey sponsor or various key constituent groups are likely to be evident to the respondents at a relatively broad level (for example, a survey on the interest in various benefits options is probably related to an initiative of the human resources function). The less the items show the preferred responses the better.

For example, the question that follows reflects the general assumption that senior leadership is overpaid:

To what extent do you think the senior leadership of your organization is overpaid?

1	2	3	4	5	DK
To a very small		To a moderate		To a very great	
extent		extent		extent	

Although this may indeed be the case, by phrasing the question in this manner the respondent is (1) forced to agree with this sentiment to a very small extent at least, even if he or she feels that the

statement is not true at all, (2) is reminded of the pay disparity issue, which might negatively affect the remainder of the items to be rated following this one, and (3) is given the subtle message, presumably endorsed by the survey sponsor, that senior leaders are overpaid.

A better item reflecting the same type of content might read as follows:

<i>With respect to pay, senior leadership is</i>					
1	2	3	4	5	DK
Very underpaid		Fairly paid		Very overpaid	

PRINCIPLE 6: Ensure Item-Scale Agreement.

The final principle of good survey item design concerns the extent to which an item stem matches the scale options provided. We have paid attention to the type of question, scale options, and specific issues and pitfalls when phrasing new items. However, regardless of the format or content, the item should be internally consistent. This is another relatively simple idea in concept, but in practice it is easy to confuse or obscure the response options by adding too many additional or unrelated scale descriptors. For example, the question below regarding value placed on employees ranges from not being valued or respected to being treated well (whatever that means to the respondent):

<i>To what extent does Company XYZ value its employees?</i>					
1	2	3	4	5	DK
To a small extent (employees are not valued or respected)			To a very great extent (employees are treated well)		

These two options neither match each other or the item stem. One of the simplest ways to correct many of these inconsistencies is to ensure that the only words used in the ends of the scale are those taken from the stem of the item itself. Additional outside readers and testing also help a great deal.

Piloting the Survey

The last step in the survey design process consists of piloting (or pretesting) the survey with a real group of respondents. This is the acid test as to whether or not the instrument that has been so painstakingly designed is clear, understandable, and comprehensive with respect to what it purports to measure (Rogelberg and Waclawski, 2001). The piloting process is often one of the first elements to be curtailed when project timing begins to slip and timelines are readjusted, but the pilot is really one of the few legitimate places where problems and issues inherent in the survey tool can be identified and resolved before they cause significant damage to the overall survey effort. It is often the only phase in which people not directly involved in the planning, development, and construction process have an opportunity to provide their relatively unbiased input.

When piloting a survey instrument the respondents should assess the content of the questionnaire itself according to the following three criteria:

1. *Clarity*: Are the instructions and items easy to read and understand?
2. *Relevance*: Are the items meaningful to the participant?
3. *Specificity*: Are the items sufficiently detailed, or are they too general in nature?

It is useful to query participants about these three components of the survey through the use of a pilot survey questionnaire. This survey-within-a-survey asks them to rate the larger instrument on these three basic dimensions. It also allows for other types of information or hypotheses to be gathered and tested as well (for example, assessing differences in content layout and item ordering, using extra numbers of items with the intent of reducing a certain number, determining the average length of time needed to complete the tool). Exhibit 2.2 provides a sample instrument of this type that has been used in an actual pilot survey assessment project.

Exhibit 2.2. Sample Pilot Test Survey Questionnaire.

Purpose of the Questionnaire

You have been chosen as one of 200 employees who are being asked to participate in a pilot test of the enclosed Company XYZ survey. Your participation will help refine this survey for use throughout your organization and is therefore very important.

This questionnaire is designed to give senior leadership in your company feedback from employees on important issues facing your organization today. Over the past few months, a sample of employees has been queried on this matter, both in interviews and focus group meetings. The key themes that have emerged have been translated into this survey, which you are being asked to complete. It should only take 30 to 60 minutes of your time. When completing the survey please consider its usability in terms of the following criteria, as you will be asked to evaluate this survey after you have completed it:

Clarity: Are the instructions and items easy to read?

Relevance: Are the items meaningful to you?

Specificity: Are the items detailed, or are they too general in nature?

Please be frank in responding to this questionnaire. This information will be of little value unless you provide as accurate an evaluation as you can. Your responses will remain completely confidential. Under no circumstances will your ratings be released to others in your organization. The data will be analyzed by an outside contractor.

Instructions: Please answer the following questions

1. How long did it take you to complete the questionnaire? Circle your response.
 - a) Less than 30 minutes
 - b) Between 30 minutes and 1 hour
 - c) Between 1 and 1 and 1/2 hours
 - d) Over 1 and 1/2 hours
2. What were your general reactions to the survey? (Please write in the space below.)
 - a) Very negative

(continued on the next page)

Exhibit 2.2. Sample Pilot Test Survey Questionnaire. (continued)

- b) Negative
 - c) No reaction (neutral)
 - d) Positive
 - e) Very positive
3. What were your reactions to the cover letter and instructions (for example, was the intent of the effort clearly communicated)?
4. Please list any items that were difficult to answer and specify reasons using the list below:
- a) Unclear
 - b) Not relevant to my work site
 - c) Too general in scope—hard to rate
5. Did the response scale (1 = To a very small extent to 5 = To a very great extent) provide you with enough choices in making your ratings?
6. What themes or areas, in your opinion, received either too much or not enough coverage (in terms of items)?

Areas covered too much:

Areas not covered enough:

Areas not covered at all:

7. Are there any other issues, concerns, or suggestions you would like to raise to help improve the survey?
-

Results from this type of test assessment provide the survey practitioner and the survey design team with invaluable information about the draft document beyond the standard means, standard deviations, ranges, and missing data frequencies associated with a pilot of only the survey tool itself. In combination, this information should be used to guide the survey design team in making the necessary modifications to the style, content, and language of the final instrument. The objective nature of the pretest data (assuming the test was conducted with a group of individuals not associated with the survey project) is also useful in helping survey team members construct an instrument free of their own biases and create a survey that is truly customer-driven. At this stage, the survey team should have a completed assessment tool that has been well tested and is ready for the next phase of the survey process—administration.

Checklist for Step Two

- Convene or assemble a survey design team.
- Involve strategically placed, highly visible, and credible members of management.
- Involve technical and conceptual experts.
- Gather preliminary information about important issues.
- Identify key issues by summarizing and integrating all sources of information.
- Discuss your findings with those who gave you input.
- Draft the initial survey document based on your agreed key issues. Consider the following:

Survey length

Number of items per content area

Number of response options

Unipolar versus bipolar response options

The key issues

Parsimony

Double-barreling

Clarity of wording

Leading and biased questions

Item-scale agreement

- Pilot the survey with your representative group and other organizational members.