Best Practices for the Academic User
Tips from Qualtrics Users at MIT

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MIT Institutional Research (IR)

- Reports to the Provost, chief academic officer
- Support academic departments & associated areas
- Maintain data to respond to accreditation, external requests, support committees and special studies
  - Historical data on People, Space & Money
  - Faculty data, including educational background, honors and awards, productivity measures
  - Survey data, including historical and peer trends

Mom, we collect & analyze data to help MIT make decisions
Our surveys

- Census surveys to “ask a little bit about everything”, run in concert with peer institutions for comparison
- Tightly focused MIT-only surveys as needed: Commuting to MIT; Library Services; High Performance Computing; Dorm Security Survey
- Surveys we support are sponsored by senior leaders on campus
Bring higher education interests together.

- Member of Association of American Universities Data Exchange (AAUDE) and the Consortium on Financing Higher Education (COFHE)
- Core survey instruments for member schools to administer, with opportunity to add local questions
- Schools exchange record-level survey data through these consortia to view results with more context

A few peer schools:
- Boston University
- Brown University
- Caltech
- Carnegie Mellon
- Cornell University
- Duke University
- Harvard University
- Johns Hopkins
- Northwestern University
- Princeton University
- Rice University
- Stanford University
- U Chicago
- U Pennsylvania
- Washington U in St. Louis
- Yale University

Help our campus run better surveys.

- Establish guidelines to assist those who want to administer surveys
- Review surveys others wish to run
- Share a schedule of surveys, facilitating combination of surveys with similar themes.
- Publish overall results and survey instruments for major surveys administered on campus
Share surveys with our community.

<table>
<thead>
<tr>
<th>Audience</th>
<th>Survey</th>
<th>Last</th>
<th>Next Survey</th>
</tr>
</thead>
<tbody>
<tr>
<td>Undergrad Students</td>
<td>Freshman / First Year</td>
<td>2012</td>
<td>July 2014</td>
</tr>
<tr>
<td></td>
<td>Enrolled Undergrads</td>
<td>2011</td>
<td>Spring 2015</td>
</tr>
<tr>
<td></td>
<td>Senior</td>
<td>2012</td>
<td>Spring 2014</td>
</tr>
<tr>
<td></td>
<td>Parents of Undergrads</td>
<td>2012</td>
<td>Spring 2017</td>
</tr>
<tr>
<td>Graduate Students</td>
<td>Incoming Grad Students</td>
<td>2013</td>
<td>Fall 2015</td>
</tr>
<tr>
<td></td>
<td>Enrolled Grad Students</td>
<td>2011</td>
<td>Spring 2015</td>
</tr>
<tr>
<td></td>
<td>Doctoral Exit</td>
<td>2013</td>
<td>ongoing</td>
</tr>
<tr>
<td>Students (mixed)</td>
<td>Graduating Students</td>
<td>2012</td>
<td>May 2013</td>
</tr>
<tr>
<td></td>
<td>Student Quality of Life</td>
<td>2013</td>
<td>Spring 2017</td>
</tr>
<tr>
<td>Faculty &amp; Staff</td>
<td>Quality of Life</td>
<td>2012</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Faculty Survey</td>
<td>2012</td>
<td>Spring 2016</td>
</tr>
<tr>
<td></td>
<td>Postdoctoral Scholars</td>
<td>2010</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Future of MIT Education</td>
<td>2013</td>
<td>tbd</td>
</tr>
</tbody>
</table>

- Overall results posted on mit.edu/ir/surveys.
- Department leaders have access to reports and analyses for their own areas.

How IR uses Qualtrics

- All IR surveys are now administered in Qualtrics.
- IR has “advanced” survey creators to code complicated questions and instruments.
- Basic survey reporting and data checks are done using Qualtrics reports while the survey is live.
- Select groups may view and mine data without sharing record-level responses.
Best Practices & Tips

• Survey Creation and Editing
• Panels and Embedded Data
• Awarding Incentives
• Sharing Reports

Survey Creation and Editing Tips
Name your surveys with a title.

Set the title responders see in the browser tab in Survey Options:

Name your surveys with a header.

Add a header that persists across all pages with the name of the survey:
Copy the “best” questions.

- Qualtrics lets you easily search your past surveys and survey libraries for questions.
- At the end of each question block, you may “Copy Items From...” to add questions to your current survey.

Clean your labels.

The data files have:
- *What role(s) have you had at MIT? Mark all that apply...* - MIT Faculty or Staff
- *What role(s) have you had at MIT? Mark all that apply...* - MIT Student ...

We can **shorten** the stem in the data files:
- *Role*-MIT Faculty or Staff
- *Role*-MIT Student
- *Role*-Other
Clean your labels.

- Edit the Question Label to shorten the stem returned in the data files.
- Does not affect what the respondent sees on the survey; does change the question stem in reports.

Cautiously change response values.

- Our convention is for “better” ratings to have higher numbers (dissatisfied=1; satisfied=5).
- For questions with ranges, we prefer to set the value to a midpoint (1-10=5; 10-20=15; 20-30=25).
- Questions that have items moved around during editing may be numbered out of expected order ($100=2, $200=1, $300=5).
Cautiously change response values.

Do not force or request a response.

- MIT Institutional Review Board: “This survey is entirely voluntary, and individuals may answer as few or as many questions as they wish.”
- We do not force or request a response to any survey or question.
- Let the respondent tell you as much they want.
- Code sensitive questions as multiple-answer, with exclusive answers.
Help responders opt-out of a question.

• Instead of single answer, make the question multiple answer
• For each option, select “Make Answer Exclusive”; this allows the respondent to uncheck a response

Add a table of contents.

• Allow the user to see the sections that are coming up, and more easily navigate to past sections
• Can use exclusively for the survey review process for lengthy surveys
Add a table of contents.

Panels and Embedded Data
Don’t ask if you know the answer.

- Basic demographic information available for every person
- When appropriate, suppress these questions and **pre-load the data** to a Qualtrics panel
- Embed this panel data in the survey flow to include it in the data file

Load known demographics to a panel.

In the CSV file with the usual panel fields, include columns with the demographics you wish to pre-load:
Embed these fields in your survey.

Awarding Incentives
Let the respondent choose a prize.

For any survey with incentives, we add a question at the end offering a choice, including an opt-out.

**Thank You Drawing**

As our thanks for completing the survey, all survey completers will be entered into the drawing for a $500 grand prize, TechCash credits of $100, $50 and $25, and $50 Zipcar gift certificates. Please tell us which grand prize you would prefer:

- $500 MIT TechCash
- $500 American Express Gift Cheques
- I do not wish to be entered in the drawing.

Identify prizes winners in an instant.

- Generate excitement on some surveys with an instant winner notification.
- In the survey flow, add a randomizer with a block for winners to see, and end of survey elements for the rest. Ask the winners to pick a prize to capture who won.
Sharing Reports

Setup reports **before** you go live.

- Generate test responses under the Advanced Options menu
- View the initial survey report in View Reports on the View Results tab
- Flip through the report with test responses as a quick data capture check
- Start formatting the report as something you would share with others
Share reports with a password.

Thank you!
mit.edu/ir/surveys – jag@mit.edu
COFHE & AAUDE Schools

- Amherst College [C]
- Barnard College [C]
- Boston University [A]
- Brandeis University [A]
- Brown University [C & A]
- Bryn Mawr College [C]
- California Institute of Technology [A]
- Carleton College [C]
- Carnegie Mellon Univ. [A]
- Case Western Reserve [A]
- Columbia Univ. [C & A]
- Cornell University [C & A]
- Dartmouth College [C]
- Duke University [C & A]
- Emory University [A]
- Georgetown Univ. [C]
- Georgia Tech [A]
- Harvard [C & A]
- Indiana University [A]
- Iowa State University [A]
- Johns Hopkins [C & A]
- McGill University [A]
- Michigan State U. [A]
- MIT [C & A]
- Mount Holyoke [C]
- New York University [A]
- Northwestern [C & A]
- Oberlin College [C]
- Pennsylvania State [A]
- Pomona College [C]
- Princeton [C & A]
- Purdue University [A]
- Rice University [C & A]
- Rutgers, New Jersey [A]
- Smith College [C]
- Stanford [C & A]
- Stony Brook [A]
- Swarthmore College [C]
- Texas A&M University [A]
- The Ohio State University [A]
- Trinity College [C]
- Tulane University [A]
- University at Buffalo [A]
- Univ. of Arizona [A]
- Univ. of California* [A]
- Univ. of Chicago [C & A]
- Univ. of Colorado Boulder [A]
- Univ. of Florida [A]
- Univ. of Illinois at Urbana Champaign [A]
- Univ. of Iowa [A]
- Univ. of Kansas [A]
- U. Maryland at College Park [A]
- Univ. of Michigan [A]
- U. of Minnesota, Twin Cities [A]
- Univ. of Missouri-Columbia [A]
- Univ. of NC at Chapel Hill [A]
- Univ. of Oregon [A]
- Univ. of Pennsylvania [C & A]
- Univ. of Pittsburgh [A]
- Univ. of Rochester [C & A]
- Univ. of Southern California [A]
- Univ. of Texas at Austin [A]
- Univ. of Toronto [A]
- Univ. of Virginia [A]
- Univ. of Washington [A]
- Univ. of Wisconsin-Madison [A]
- Vanderbilt University [A]
- Washington U. in St. Louis [C & A]
- Wellesley College [C]
- Wesleyan University [C]
- Williams College [C]
- Yale [C & A]

Survey Development Process

<table>
<thead>
<tr>
<th>Author Survey</th>
<th>Understand high level need to help define methodology. Draft questions with potential for analysis in mind. Test survey with potential audience. Draft invitation and reminders to non-responders.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Pull Sample</td>
<td>Determine survey sample: pulling together initial lists can help determine type of survey (sample or census) and suggest strategies for the email contacts, timing, authentication and incentives.</td>
</tr>
<tr>
<td>Host Survey</td>
<td>Create web form with desired question types, branching, and authentication. IR has used Qualtrics since 2011 for this purpose, generally without loading personally identifiable information. Other options seen around campus include Survey Monkey, Google Docs, custom web forms.</td>
</tr>
<tr>
<td>Launch Survey</td>
<td>Preferred method is personalized email invitations &amp; reminders to non-responders from recognizable senders with varied subject lines. Monitor replies, examine response by subgroups.</td>
</tr>
<tr>
<td>Close &amp; Archive</td>
<td>Clean up, merge system of record data, remove identifiers. Award incentives. Save instrument, methodology, codebook, raw data in CSV and SPSS. Share overall frequencies and highlights.</td>
</tr>
<tr>
<td>Analyze, Share, Iterate</td>
<td>Dig deeper into the data to answer questions the survey was intended to explore. Read and code open text responses; bring coded statements into data file. Look for differences by respondent and trends. Identify areas to explore further. Make the data last.</td>
</tr>
</tbody>
</table>