QUESTIONNAIRE PILOTING CHECKLIST
J-PAL RESEARCH RESOURCES

PRE-PROPOSAL PLANNING

☐ Piloting is a vital part of the survey process. All surveys—including back-check surveys—should be piloted.

☐ At the end of each pilot survey, ask the respondent for feedback, e.g., was there a reason for them to withhold information? What were they thinking when answering particular questions? What answer did they think we wanted? Were they uncomfortable answering?

☐ Throughout the survey, encourage respondents to think out loud/offer feedback in a way that would not be possible during actual surveys

☐ Pilot questionnaires until they are right, i.e., enumerators and respondents understand the question the way you want them to

☐ Be sure to test each iteration of the questions and in many different contexts; a good rule of thumb is to test the survey at least 30-40 times if it contains lots of new questions, or at least 15 times if it mostly contains previously used questions

☐ Discuss with your team after every round of piloting

☐ Be sure to test the digital version of your survey on the device you'll actually use in the field

SURVEY INSTRUMENT CHECKS

☐ Identify potential problems with wording or content, including:

    ☐ Adding more options or changing questions from open- to close-ended

    ☐ Checking type and wording of questions: Should we use Likert scales instead of yes/no, or are there framing (or other) issues with the question? See more in the survey design resource

☐ Verify that all respondents are interpreting the questions in the same way

☐ Identify questions that require additional instructions for surveyors

☐ Check that questions are measuring what they intend to measure

☐ Identify non-essential questions that could potentially be dropped from the final version of the survey

☐ Check that questions are not leading/biased

☐ Check that questions provide sufficient variation

☐ Identify common responses so they can be pre-coded as options

☐ Check the ordering of questions and sections (e.g., are we asking less sensitive questions first, and are we moving from general to particular?)

☐ Check local language translation

☐ Check whether survey duration is close to the estimated time

☐ Ensure skip patterns and constraints are programmed correctly. See more in survey programming resource

RESPONDENT SELECTION CHECKS

☐ Finalize the choice of respondent: Assumptions may be incorrect (e.g., the head female may know more about household finances than the head male) or different respondents may be needed for different sections

☐ Determine whether respondents' interest is sustained throughout the interview (e.g., are respondents becoming fatigued or facing other constraints (e.g., childcare duties, job requirements, etc.))

☐ Verify that interviewers and respondents are comfortable with the flow of the interview

ENUMERATOR CHECKS

☐ Notice the way experienced surveyors ask the questions and, if possible, incorporate part of their "conversation" into question text that all surveyors read out loud for smooth flow of the questionnaire

☐ Identify potential issues or snags for the interviewer (e.g., where they need to repeat questions, correct misinterpretations, or record volunteered information)

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