10th GESIS Summer School in Survey Methodology
[2nd Virtual GESIS Summer School]
28 July – 20 August 2021

Syllabus for Short Course C: Pretesting Survey Questions

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Date: 28-30 July 2021
Time: 09:00-12:00 + 13:00-14:00
Time zone: CEST/CEDT, course starts on Wednesday at 09:00 am
Venue: Online via Zoom

About the Instructors:

Dr. Cornelia Neuert is a social scientist and head of the team Questionnaire Design & Evaluation at GESIS – Leibniz Institute for the Social Sciences. She has been working as research associate in the GESIS pretesting unit since April, 2012. Together with the staff of the pretesting unit, she has conducted numerous cognitive pretests for various research projects and survey programs. Her research focuses on methods for testing and evaluating survey questionnaires and questionnaire design.

Dr. Timo Lenzner is a senior researcher at the cognitive pretesting unit at GESIS – Leibniz Institute for the Social Sciences. His main responsibilities include conducting cognitive pretests for large survey projects such as the ISSP, SHARE or PIAAC and carrying out research on questionnaire design and questionnaire evaluation methods.

Selected Publications:


Short Course Description:

The course covers the basic elements of evaluating questionnaires and highlights the general importance of carrying out (cognitive) pretests before fielding a questionnaire. This is achieved through both lectures and group exercises. In the lectures, we introduce three pretesting approaches, namely questionnaire appraisal systems, cognitive interviewing and web probing. The exercises aim at familiarizing participants with these pretesting methods. We focus on the sorts of information gathered by each method and how the information can be used to reduce measurement error. In this context, we will also discuss the pros and cons of the different pretesting methods and mixed-method approaches. Besides a more general introduction of the pretesting approaches, participants will receive practical advice on how to conduct (cognitive) pretesting projects and how to decide which pretesting methods should be selected in a given research situation.
Keywords:

Course Prerequisites:
- Basic knowledge in questionnaire design; however, some practical experience in conducting surveys will be beneficial.
- There are no statistical prerequisites.

Target Group:
Participants will find the course useful if:
- They develop their own questionnaires for own data collection
- They work in a survey organization and work on questionnaire design and evaluation
- They use survey data and wish to understand the importance of pretesting to reduce measurement error

Course and Learning Objectives:
By the end of the course participants will:
- Be familiar with current (cognitive) pretesting methods
- Know the pros and cons of the different approaches to test survey questions
- Be able to make an informed decision about which pretesting method and the ways in which several methods can be combined within a pretesting project
- Be able to evaluate survey questions using the selected methods

Organizational Structure of the Course:
- This is a three-day course with a total amount of 12 hours of virtual class time. The course structure includes 3 hours of in-class teaching in the morning with a mix of teaching and exercises, and Q&A sessions. Exercises will be divided in group and individual exercises.
- During the group exercises, lecturers will be available to support in the breakout rooms.
- After the lunch break, we will discuss the exercises and be available for group and individual consultations (Q&A session).

Software and Hardware Requirements:
Participants need laptop/desktop computer that enables them to access the internet.
Regarding statistical software that is not free: We intend to provide the participants with Stata licences. All other statistical software needs to be free; we cannot provide licences of Mplus, SPSS, or other proprietary software (except Stata) for participants.

Long Course Description:
To ensure that the data collected through questionnaires are of high quality (i.e., valid, reliable, and unbiased), researchers must formulate questions that are easily and consistently interpreted by respondents in the ways intended by the researchers. Therefore, an important stage in the data collection process is to conduct a pretest before fielding the questionnaire and starting the actual data collection. However, several pretesting approaches exist that address different aspects regarding the question assessment. This course wants to provide an overview over different qualitative pretesting approaches and to provide the participants with a guideline on how to select the optimal pretesting approach in a given research situation. In this course, we will combine lectures, in-class exercises, and Q&A Sessions.

On day one, we start with a general introduction why it is necessary to conduct (cognitive) pretests and give a short overview over different pretesting approaches and their individual pros and cons. After this general introduction, we present two approaches in more detail, namely Expert Reviews and Question Appraisal Systems. The lecture is followed by an exercise in which participants apply the QAS-99 Coding Form (Willis & Lessler, 1999) – a checklist of potential question problems – to evaluate a draft questionnaire. Finally, we discuss how participants got along with the QAS-99, in what situations this method could ideally be applied, and how it can be combined with other pretesting methods. The afternoon of day 1 is reserved for group and individual consultations.
The focus of day 2 is on the method of cognitive interviewing. We introduce the method and discuss different approaches (e.g., probing vs. think aloud) as well as techniques (e.g., different probe types). In addition, we will provide guidance on how to plan, conduct, and analyze cognitive interviews and we will do several exercises in this context. In the afternoon, we give a short presentation on eye tracking (i.e., the recording of participants’ eye movements while they answer a questionnaire) and how it can be used to supplement cognitive interviewing. Again, day 2 will end with a Q&A session.

On day 3, we introduce the method of web probing. Web probing is the implementation of probing techniques from cognitive interviewing in web surveys. This allows for large sample sizes in pretesting and facilitates data collection of broader geographical variety (as well as different countries) and increases the comparability of pretesting results. On the one hand, we will discuss methodological findings regarding the optimal implementation of web probing (e.g., visual design), on the other hand, we will provide guidance regarding the planning, conducting, and analysis of web probing studies. The lecture on web probing will be supplemented by an exercise in which participants will be able to code and analyze responses to probes implemented in web surveys.

In the final afternoon session, we will focus on the question on how to decide which pretesting methods should be selected in a given research situation and summarize the advantages and disadvantages of the different pretesting approaches covered during the course. Afterwards, there will be time for group and individual consultations.

Day-to-day Schedule and Literature:

<table>
<thead>
<tr>
<th>Day</th>
<th>Topic(s)</th>
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<tbody>
<tr>
<td>1</td>
<td>Introduction</td>
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<tr>
<td></td>
<td>▪ Reasons for conducting pretests and goals of pretesting</td>
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<td></td>
<td>▪ Overview over different pretesting methods</td>
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<td></td>
<td>Expert Review &amp; Questionnaire Appraisal Systems</td>
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<td></td>
<td>▪ Different forms of expert reviews</td>
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<td>▪ Exercise on application of QAS-99</td>
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<td>Q&amp;A Session</td>
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<td>Suggested reading:</td>
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<tr>
<td></td>
<td>▪ <a href="https://docplayer.net/147787-Question-appraisal-system-qas-99.html">https://docplayer.net/147787-Question-appraisal-system-qas-99.html</a></td>
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<td>2</td>
<td>Cognitive interviews</td>
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<td></td>
<td>▪ Planning cognitive interviews + Exercise</td>
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<td></td>
<td>▪ Conducting &amp; analyzing cognitive interviews + Exercise</td>
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<td></td>
<td>Supplementing cognitive interviews with Eye tracking</td>
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<td>Suggested reading:</td>
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<tr>
<td>3</td>
<td>Web Probing</td>
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<td></td>
<td>▪ Introduction to web probing</td>
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<td></td>
<td>▪ Optimal implementation: Visual design, probe order, nonresponse reduction</td>
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<td></td>
<td>▪ Planning &amp; conducting web probing studies</td>
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<td>▪ Analyzing web probing studies + Exercise</td>
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<td>Discussion of advantages and disadvantages of the different pretesting methods</td>
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<td>Suggested reading:</td>
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Preparatory Reading:


Additional Recommended Literature: