



# More tools for monitoring: Survey

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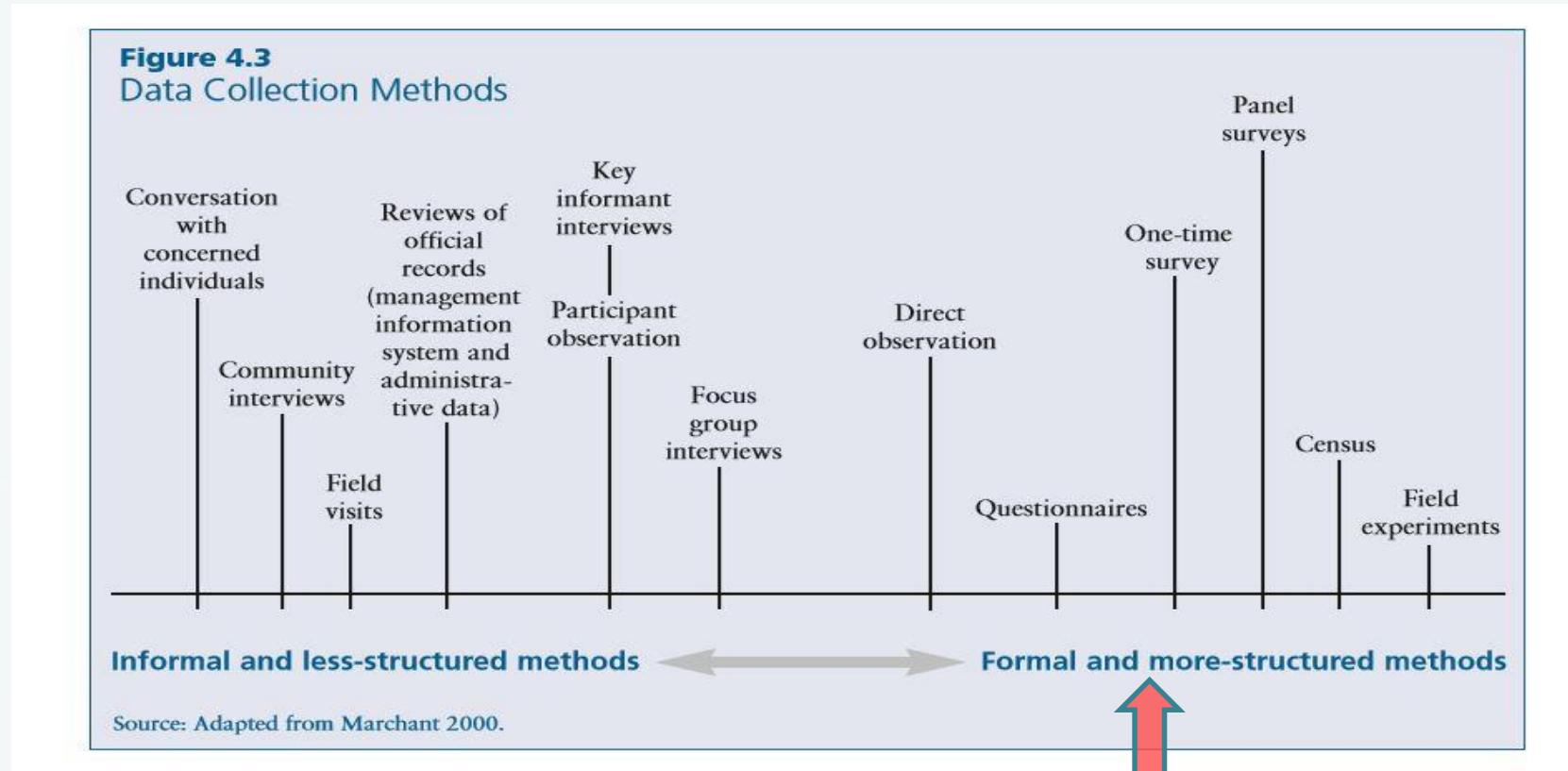
# Objectives

This session will:

- ❖ Introduce the survey and its role in monitoring.
- ❖ Identify and describe the seven steps of a simple survey.



# Reminder: Data collection method



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## Survey according to USAID

Surveys are taken for granted as few glossaries offer a definition of this data gathering operation. USAID (United States Agency for International Development) gives this concise definition: “Systematic collection of information from a defined population through interviews or questionnaires.” Its main characteristics are:

- It is efficiently used for quantitative data gathering;
- More formal than other methods, it often requires a rigorous implementation strategy involving complex choices, for ex. random/non-random, open-ended questions versus closed-ended, etc.;
- Planning involves juggling with three core variables: time, cost, and complexity.

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## Survey and monitoring

- Surveys are but one of a number of information gathering tools, but it is an important means of compensating the flaws in a monitoring system by:
  - drawing a reliable picture at a crucial moment in the deployment;
  - bringing together supplementary data from a significant sample of the target (or non-target) groups;
  - being also a more cost-effective way to gather both quantitative and qualitative information together;
  - finally by feeding important components of the deployment sequence such as baseline, mid-term evaluation, and satisfaction assessments.

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## Seven steps to a small survey

- 1. Formulate study objectives
- 2. Review the literature
- 3. Prepare survey questions
- 4. Design the questionnaire
- 5. Choose the type of sampling
- 6. Choose the mode of contact
- 7. Analyze the data.

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## Steps 1 & 2

- 1. Formulate study objectives
- Identifying the specific objectives of the survey helps focus the study, so that only relevant and essential issues are included. A participatory approach at the preliminary planning stage will bring together key stakeholders which might reduce the risk of including “nice to know” topics.
- 2. Review the literature
- Conduct a review of existing information, including project or program records and documents, published and unpublished studies, and statistical data available through public and private agencies. An effort should also be made to review earlier surveys on similar and related topics.



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## Steps 3 & 4

- 3. Prepare survey questions
- Contrary to popular conception, this task is not simple. It requires careful reflection because the wording, length, and open or closed nature of a question can all significantly affect the responses given. The recall period is also important.
- 4. Design the questionnaire
- The next step is design a carefully crafted short questionnaire that can be easily administered to respondents. All questions should be arranged in a logical sequence to facilitate the interview. Practical guidelines for conducting interviews need to be developed.

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## Steps 5 to 7

- 5. Choose the type of sampling
- Choices range from the more rigorous probability sampling with randomization to the less constraining but sometimes only option of informal sampling. In all cases, pure or mixed, it will be the field which will inform the choice.
- 6 Choose the mode of contact
- Field conditions will also dictate if the web-based survey, interview (in person or virtual), phone, or distributed questionnaire (mail or in venues such as classrooms) in the best option.
- 7. Analyze the data
- Sometimes, the weakest step in the survey as human resources are very often sent to other tasks. To lower, risks it is suggested to do an analysis plan at the planning stages with assigned responsibilities to specific staff members.



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