Soc 752: Measurement and Questionnaires for Survey Research
(Questionnaire Design)
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Be sure to check which office to come to!

COURSE DESCRIPTION: This course provides an introduction to the conceptual issues raised by conducting measurement using self-reports in surveys, an overview of the literature that addresses theoretical and practical problems in questionnaire design, and practice in developing, reviewing, and writing standardized questions and questionnaires. Particular attention is paid to recent work that draws on cognitive psychology to inform designing standardized instruments. The course is structured around the stages of instrument development: developmental interviewing, question writing, question testing, pretesting, and questionnaire formatting. Issues involved in telephone interviews and computer-assisted interviews will be considered at several points, but the assignments use face-to-face interviews with paper instruments. The material covered in this course is relevant for standardized measurement in many social research contexts in addition to surveys, such as laboratory experiments.

This course is pre-statistical in the sense that it considers issues that are dealt with before statistical analysis of data begins and in the sense that course assignments require no statistical analysis. The course provides conceptual and practical tools to use in planning and executing your own research. You do need to be able to read and interpret research that includes statistical analysis.

Lectures assume that you have completed the assigned readings before the lecture, and lectures do not systematically summarize the readings. The schedule of readings given here is fixed, regardless of how much the lectures appear to deviate from the schedule.

COURSE ASSIGNMENTS AND REQUIREMENTS: Course grades are based on 7 assignments. The assignments provide an opportunity to work on a single problem through most stages of questionnaire design. For the final project, you revise the assignments and prepare a final, complete, instrument. The reports required with the assignments must be written in a professional style. All instrument (questionnaire) drafts must also be typed, except that some complex grids may be printed neatly if your word processing skills so require; check with me first if you wish to do this.

Seven Graded Assignments. You select a topic. The assignments lead you through the steps of developing a complete, though limited, instrument on that topic. In addition, there is an assignment in which you construct a roster and one in which you design a split ballot experiment. I will hand out the instructions for all the assignments during the first week of class. Each instrument assignment requires drafting a small portion of an instrument, testing it in two interviews, revising it, and writing a brief report. In the last assignment you put the pieces of the questionnaire together into a complete instrument, pretest it, write a final report, and present a final proposal for a split ballot experiment. You must complete all assignments in order to receive a grade for the course.

Criteria for Evaluation. In evaluating class assignments I consider how well the work applies relevant concepts and findings presented in lectures and readings. The reports should explicitly refer to relevant results from the readings and show that you have read and understand the material; I consider how well
you deploy the readings when I grade the reports. In grading the instruments, I also consider the practicality, comprehensiveness, and creativity of the solution to the problem presented in the assignments. For the final report, I expect you to refer to research beyond that on the course syllabus. Finally, I take into account how well you present your solution--whether the presentation is organized, clear, and professional.

Class Participation. For some classes I will identify several articles to prepared for a class discussion. Come prepared to be called on if the discussion grows quiet! When articles are assigned for discussion, they are required but not formally graded. If your grade for the class as a whole is "borderline," I take contributions to class discussion into account in assigning the final grade.

Grading. I deduct a letter grade for each day an assignment is late. Assignments 1 and 2 each contribute 12.5% to your grade. Assignments 3, 4, 5, 6, and 7 (the final assignment) each contribute 15% to your grade.

No incompletes. All assignments must be completed on time.

Auditors. Auditors may sit in by arrangement with the instructor. Please formally register for this class as an auditor if possible

Human Subjects. This course involves exercises in which you develop a standardized instrument. As part of those exercises, you try out your instrument in approximately 2 interviews in each of several assignments. You must realize several things:

- You may conduct these interviews as part of the course without obtaining a separate approval for your research project from the IRB, as long as you do not disseminate the results of that research. If you plan to do so, as you might if your research is for your dissertation, you must notify me and, under the direction of the faculty advisor for your research, obtain IRB approval before beginning the interviews.
  - See the link about student research: https://kb.wisc.edu/gsadminkb/page.php?id=29168
- Regardless of whether you are conducting these interviews only as part of this course or to obtain knowledge that you will disseminate, you must complete CITI training. See information about this here: https://kb.wisc.edu/gsadminkb/page.php?id=32559
  - You must send me an email confirming that you have completed this tutorial by 20 September. The subject line must read: “soc752 - Confirming CITI Training.”
  - You must obtain informed consent (see below) from everyone you interview and protect their privacy. No information that would identify the person you interviewed should be attached to their answers.

Sensitive Data. Read about university policies and procedures for handling sensitive data:

http://www.ssc.wisc.edu/sscc/resources/sensitive_data.htm

Informed Consent. The following site provides information about informed consent: https://kb.wisc.edu/sbsedirbs/page.php?id=57722. Here is an excerpt:

Required Elements of Informed Consent
Regardless of the format of the consent process, consent documents must include the following Required Elements of Informed Consent:

- The study should be clearly identified as a (UW-Madison) research study.
- Include a description of the purpose of the study.
- Describe what the subject’s participation will involve, including the estimated duration/time commitment.
- Any potential risks (and steps the researcher has in place to mitigate those risks). Those risks could include:
  - Sensitive topics, or questions that evoke an emotional response.
  - The risk of a breach of confidentiality.
- Any potential benefits:
  - There are typically no direct benefits to participating in minimal risk research.
- Steps to ensure confidentiality of research records:
  - A statement of who will have access to data, protection and security measures for data such as the use of pseudonyms, data encryption, password protection(s), and secure storage of all data including audio, video, and photos (as applicable).
- Any compensation:
  - Parking pass, gift cards, extra credit, etc.
  - Ensure that the amount or type of compensation is not coercive.
  - Compensation is not a benefit and should be listed in a separate section of the consent form.
- Whom to contact with questions:
  - PI/researcher(s):
    - Personal phone numbers should not be on research documents (see IRB Guidance: Cell Phone Use for Research Purposes).
  - IRB contact information as follows:
    - "If you are not satisfied with the response of the research team, have more questions, or want to talk with someone about your rights as a research participant, you should contact the Education and Social/Behavioral Science IRB Office at 608-263-2320."
- A statement that participation is voluntary:
  - Participants must have the ability to skip or decline to answer any questions and subjects can withdraw at any time.

READINGS: Readings average 80-100 pages each week.

Required readings. I ordered a few books at University Book Store. Some of the books are also on reserve in the Social Science Reading Room (SSRR) on the 8th floor of Social Science building. These are expensive books — though they have resale value. Buy only what you need.

Required book selections and articles. Articles and chapters from books that I did not order at the bookstore are not required are marked * in the course outline. These will be on electronic reserve. Sometimes copies of overheads will be given out in class; sometimes they will be available in the copy center or on electronic reserve. Sections in the syllabus marked ** are optional.
Required Books


Or


Recommended


Additional Sources

The following additional sources may be useful.


### Topics and Readings

The course outline lists required readings. Readings marked * are on electronic reserve. I use the following abbreviations:

- **ASR** American Sociological Review
- **JASA** Journal of the American Statistical Association
- **JOS** Journal of Official Statistics
- **JMR** Journal of Marketing Research
- **POQ** Public Opinion Quarterly
- **SM** Sociological Methodology
- **SMR** Sociological Methods and Research

#### Weeks 1-2 -- Course Introduction and Measurement in Surveys


#### Weeks 3-4 – Question Development

**The Response Process**

Developmental Interviewing


**Weeks 5-8 -- Survey Questions: Overview**


**Weeks 5-8 (continued) -- Questions about Events and Behaviors**

**Questions about Events and Behaviors: Cognition and Memory**


Questions about Events and Behaviors: Errors


Questions about Events and Behaviors: Threatening Questions


Questions about Events and Behaviors: Voting


Questions about Events and Behaviors: Other Questions
Writing Questions


Design and Format of an Instrument


Social Characteristics: Household Composition


Weeks 9-12– Questions about Subjective Things

Overview


**Cognitive Processes**


**Questions about Subjective Things: Choices and Ratings**


**Questions about Subjective Things: Agree/Disagree**


Week 13 -- Questions about Subjective Things (continued) and Questions about Other Topics

Social Characteristics: Race and Ethnicity


Social Characteristics: Income


Social Characteristics: Other


Week 14 -- Cognitive Interviewing and Question Testing


*Schaeffer, Nora Cate and Jennifer Dykema. 2011. "Response 1 to Fowler's Chapter: Coding the Behavior of Interviewers and Respondents to Evaluate Survey Questions." Pp. 23-39 in Question


**Week 15 -- Interviewing and Mode of Interview**


**Week 15 -- Ethical Issues**


*The Code of Ethics of the American Sociological Association, sections 11 and 12. [Consult this document on the web.]*


*UW – Knowledge Base for Human Subjects Research in the Social and Behavioral Sciences [Consult this source on the web: https://kb.wisc.edu/sbsedirbs/]*
Departmental Notices

Sociology Graduate Program Learning Objectives

1. Students will demonstrate a broad understanding of major theories, methodologies, and research findings in the survey research literature.
2. Students will complete a small original instrument design project and design of a split-ballot experiment.
3. Students will develop an understanding of the instrument design and survey measurement through coursework and assignment.
4. Students will evaluate social science literature and employ most appropriate methods and practices in their class projects.
5. Students will develop analytical thinking skills that enable them to evaluate information pertinent to making measurement decisions.
6. Students will communicate in a clear, organized engaging manner, using language, methods, and critical tools appropriate to the social sciences.
7. Students will understand, recognize, and apply principles of ethical and professional conduct.

Accommodations. Please send the instructor an email by the end of the second week of the course if you are eligible for special arrangements or accommodations for testing, assignments, or other aspects of the course. This may be the case if English is your second language or you experience a physical or psychological condition that makes it difficult for you to complete assignments or exams without some modification of those tasks. Accommodations are provided for students who qualify for disability services through the McBurney Center. Their website has detailed instructions about how to qualify: http://www.mcburney.wisc.edu/. Provide a copy of your accommodations request (VISA) to the instructor by the end of the second week of class. If the course requires exams, we try to reserve rooms and proctors by the third week in class, so we must know of all accommodations by then.

If you wish to request a scheduling accommodation for religious observances, send an email by the end of the second week of the course stating the specific date(s) for which you request accommodation; campus policy requires that religious observances be accommodated if you make a timely request early in the term. See the university’s web page for details: https://kb.wisc.edu/page.php?id=21698

Sexual harassment and misconduct. Professional conduct and appropriate behavior are critical to create a safe learning environment for students and instructors alike. Here is a statement about sexual harassment from the University:

**What is Sexual Harassment?**
Unwelcome sexual advances, requests for sexual favors, and verbal or physical conduct of a sexual nature constitute sexual harassment when:
- submission to such conduct is a condition of employment, academic progress, or participation in a university program; or
- submission to or rejection of such conduct influences employment, academic or university program decisions; or
- the conduct interferes with an employee's work or a student's academic career, or creates an intimidating, hostile or offensive work, learning, or program environment.

**Tangible Action or Quid Pro Quo (This for That) Sexual Harassment** and **Hostile Environment Sexual Harassment** are both illegal and unacceptable.
One practical implication is that instructors (faculty or graduate students) may not date students to whom they will be assigning grades. If you believe that you have been harassed, contact the instructor or the chair of the Department of Sociology (socchair@ssc.wisc.edu).

**Academic honesty.** As with all courses at the University of Wisconsin, you are expected to follow the University’s rules and regulations pertaining to academic honesty and integrity. The standards are outlined by the Office of the Dean of Students at [http://www.students.wisc.edu/doso/academic-integrity/](http://www.students.wisc.edu/doso/academic-integrity/)

According to UWS 14, academic misconduct is defined as:
- Seeks to claim credit for the work or efforts of another without authorization or citation;
- Uses unauthorized materials or fabricated data in any academic exercise;
- Forges or falsifies academic documents or records;
- Intentionally impedes or damages the academic work of others;
- Engages in conduct aimed at making false representation of a student's academic performance;
- Assists other students in any of these acts.

For a complete description of behaviors that violate the University’s standards as well the disciplinary penalties and procedures, please see the Dean of Students website. My tolerance for plagiarism or other academic misconduct is very low. If you plagiarize or engage in other misconduct in this course, you will probably be required to discuss the matter with the Dean of Students. If you have questions about the rules for any of the assignments or exams, please ask your instructor.

**Departmental notice of grievance and appeal rights.** The Department of Sociology regularly conducts student evaluations of all professors and teaching assistants near the end of the semester. Students who have more immediate concerns about this course should report them to the chair, 8128 Social Science (socchair@ssc.wisc.edu), the Title IX office, or see this link for confidential resources, [https://compliance.wisc.edu/titleix/campus-procedures/reporting/complainant/](https://compliance.wisc.edu/titleix/campus-procedures/reporting/complainant/).