

# How to Create A Survey

May 8, 2025



# Welcome



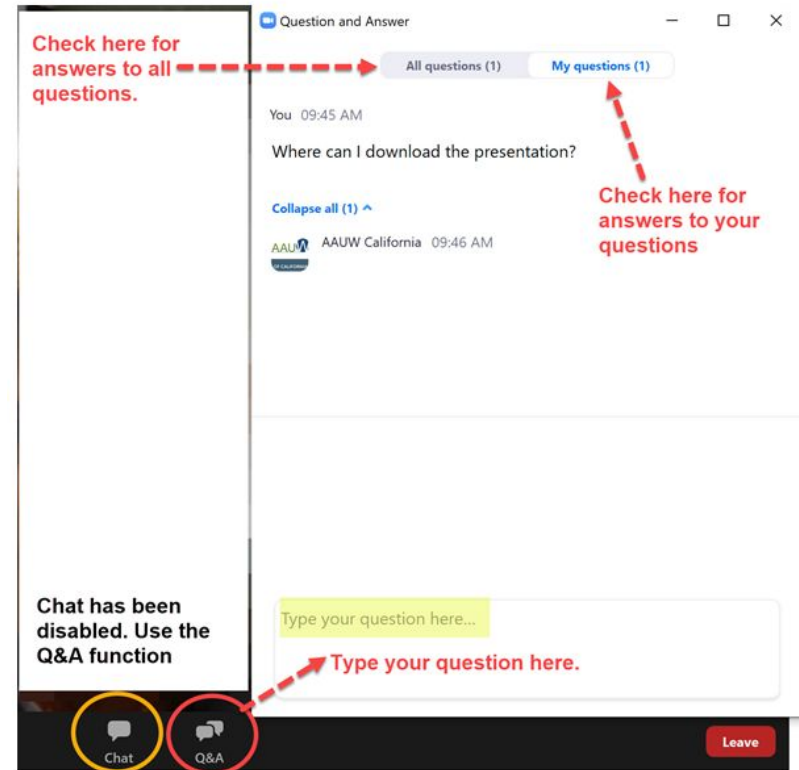
**Sandi Gabe**  
Past President AAUW California

The chat has been disabled.

Enter any questions that you have in the Q&A function.

We'll stop periodically to answer them.

The questions posed during registration will be covered during the presentation.



# What We Will Cover

- Where to use a survey/form
- Understanding the request
- Choosing the right tool - We'll focus on Google Forms tonight.
- Organizing the survey
- Creating a survey
- Testing the survey
- Distributing the survey
- Best practices
- Google Form details
  - Questions types
  - Customizing the look and feel of the survey
  - Reporting results
- Demo!

# Where To Use A Survey

1. Feedback forms (member satisfaction, program planning )
2. Satisfaction forms (events, webinars)
3. Elections
4. Sign up forms (interest groups, meetings, committee applications)
5. Service requests
6. Application forms (membership, award programs)
7. Order forms (directory, speaker request)



# Understand Your Requestor

1. Who is the audience?
  - All members, specific branch leaders?
2. What are they trying to accomplish?
3. How are they going to use the information?
4. What type of output do they want?
5. Is this a one-time event or ongoing data collection?
6. Are there any rules around who receives the survey, how they receive it?
7. By when do they need the results?
  - 1-2 weeks is generally enough time

# Identify which tool to use

Element	Google Forms	SurveyMonkey
<b>Pricing</b>	100% free	Free plan available (10 questions/25 responses); feature availability increases with each premium tier
<b>Design and Customization</b>	Limited	Robust options with premium plans \$39/month
<b>Collaboration Options</b>	"Share" form to allow others to edit	Viewing, editing, and commenting available
<b>Question Types, Rules, and Scoring</b>	More specific answer validation options and scoring options	More advanced question types
<b>Templates</b>	17 templates available	~200 templates and ~1,800 pre-written questions
<b>Branching and Conditional Logic</b>	Available for multiple choice and dropdown questions	Available for more question types
<b>Collecting Responses</b>	Embed a link in an email	Email, link, embed, Facebook Messenger, mobile embed, offline data collection. Upload mailing list, resend to those who don't respond.
<b>Analysis and Reporting</b>	Google Sheets	Extensive options for data visualization

# Organize The Survey

1. Have the requestor submit questions.
2. Consider how they will use the information and determine the best way to organize.
3. Codify and use picklists where possible for consistency.
4. Include:
  - Introductory statement
  - Contact name/email address
  - Deadline
  - Who to contact with questions





# Create the Survey

1. Create a google doc that contains the survey questions, introduction etc. Use it to collaborate with the requestor.
2. Edit meticulously.
3. Build survey after requestor signoff.

**Note:** it's not possible to import questions from Google Docs to a survey without using an add-on tool.



# Test the Survey

1. Enter test data to work out the kinks.
2. Review the output to confirm that you can produce a useable report.
3. Send the survey link to the requestor and ask them to enter test data.  
Assure them that you'll remove the data before distributing the survey.
4. Send a sample output file.

**Note:** you have to publish the form in order to send a link for someone to test it.



# Distribute

1. Via email distribution list - include a link to the survey
2. Post link on website
3. Post link in social media post.



# Best Practices

1. Include an introduction that outlines how the information will be used.
2. Don't ask complex questions.
3. Rephrase Yes/No questions. Use "How much," "How often," or "How likely" instead.
4. Include contact information for questions on completing the survey.
5. Include a deadline.
6. Customize the thank you response.



## Best Practices Continued

7. Organize similar information into sections.
8. Include a progress bar if you have more than one section.
9. Include a PDF version of the survey in your communication so respondents know what questions to expect.
10. Most questions should be “required”. If not, why ask them?

**SURVEY**

# Best Practices Continued

11. Include name and email fields instead of “collect email addresses” which requires the user to have a gmail account.

Settings

Make this a quiz

Assign point values, set answers, and automatically provide feedback



Responses

Manage how responses are collected and protected



Collect email addresses

Do not collect





# Question Types

- Text - short answer or paragraph
- Multiple choice - one answer
- Checkboxes - multiple answers
- Dropdown - good for consistency
- Linear scale - 1 to 10. You add labels. Use the same scale throughout the survey.
- Rating - 3 to 10.
- Multiple choice grid - 1 choice per topic
- Checkbox grid - multiple choices per topic
- Date
- Time

Rating  
scale



≡ Short answer

≡ Paragraph

⦿ Multiple choice

☑ Checkboxes

⌵ Dropdown

☁ File upload

⋯ Linear scale

☆ Rating

New

⋮ Multiple choice grid

⋮ Checkbox grid

📅 Date

🕒 Time

# Customizing the Look of the Survey

- Customize the theme t:
  - Change fonts of header, questions and text
  - Change header (image at the top)
    - 1600 pixels wide by 400 pixels tall
    - Create in Canva
  - Change form colors



Theme ×

Text style

Header

Yeseva One ▼ 24 ▼


Question

Bree Serif ▼ 12 ▼

Text

Roboto ▼ 11 ▼

Header

 Image uploaded ×

Color

☒ ☐ ☐ ☐ ☐ ☐

+

Background

☒ ☐ ☐ ☐





# Reviewing the Results

1. Review by question
2. Review by individual response
3. Download CSV file
4. Link to a spreadsheet
5. Print all responses
6. Delete all responses – do this before you launch

Questions **Responses 1** Settings

1 response

Summary **1 Question** **2 Individual** **4**  [Link to Sheets](#) 

Sends responses to a spreadsheet


2025 Home Tour Feedback


Did you attend the 2025 Home Tour?


1 response


Get email notifications for new responses

Select destination for responses

 Unlink form

 Download responses (.csv) **3**

 Print all responses **5**

 Delete all responses **6**

# Questions

