QUALTRICS SURVEY RESEARCH SUITE

At CSU Stanislaus

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Objectives

• Introduce **Qualtrics Survey Research Suite** tool including common uses

• Review **types of user accounts** at CSU Stanislaus

• Share CSU Stanislaus **Qualtrics Terms of Use** and rationale

• Present brief overview of Qualtrics **main features and functionality**

• Provide information about **additional resources** available from Qualtrics and CSU Stanislaus

• Discuss **services available** at CSU Stanislaus including the **Levels of Survey Project Support Services**

• Q&A
Why Qualtrics?

- **Easy** - Anyone can build, send and analyze surveys. Qualtrics can do things that take hours in other products. Crazy questions? Dizzying logics? Loads of randomizations?

- **Sophisticated** - Superior technology. If you can think it, Qualtrics can build it. Qualtrics never stops improving, constantly adding new features to match the latest breakthroughs in survey research.

- **Customize everything** - Control text, questions, messages, choices, reports, graphs, images, colors, exports, code, emails, fonts, skins, sharing, panels, logics, blocks, and...well...pretty much anything else you could imagine.

- **Product support** – Free and live support. No phone tree. Rings throughout.

- **Collaboration is a breeze** - Collaborate in real-time – across the office or across campuses. Grant anyone access to surveys and reports. Keep your research consistent and efficient.

- **Web-based** - No software to install. Access your surveys and data from any location any time you need.
Common Uses

- Applications and admissions
- Assessment research
- Customer satisfaction
- Classroom research
- Course evaluations
- Polls or election ballots
- Research, scholarly, and creative activities involving survey research or experimental research
- Tests and quizzes
User Accounts

Collaborated with Office of Information Technology to interface Qualtrics with university single sign-on authentication system.

User accounts are based on university affiliations:

- **Faculty/Staff/Administrators (Standard Qualtrics)**
  - Accounts will remain active until user is separated from the university.

- **Student (Sponsored Student Accounts)**
  - A reduced feature set
  - Requires collaboration with the faculty or staff sponsor.
  - To improve efficiency, faculty sponsor should contact IR to add permissions/make changes; not the individual students.
    - **Classroom:** Faculty may elect to have students create user accounts for a class project.
    - **Student Assistant Employee:** Staff can sponsor a Qualtrics account for a student employee.
    - **Master's and Doctoral Students:** Graduate student working on a master's thesis or doctoral research may create a Qualtrics user account.
Terms of Use Policy

Developed internally
• Office of Information Technology (OIT)
• University Institutional Review Board (UIRB), FERPA, and HIPAA compliant
• http://www.csustan.edu/IR/QualtricsTermsofUsePolicy.html

Rationale
• Protect the rights of privacy of the participants and respondents.
• Avoid harming or misleading respondents.
• Avoid the fraudulent use of resources.

Policy
• Faculty and staff are responsible for use of Qualtrics among their students.
• Non-university related activities is prohibited.
• Users will not SPAM or use other forms of unsolicited mass communication in conjunction with Qualtrics.

Consequences
• Inappropriate behavior/content/usage or other abuse of your Qualtrics account.
Main Features and Functionality
Tabs and Shortcut Buttons

- **My Surveys Tab**
  - Homepage
- **Shortcut buttons**
  - Create Survey
  - Email Survey
  - View Results
  - Message Center
- **Tasks**
  - Edit
  - Results
  - View
  - Collaborate
  - Copy
  - Translate
  - Delete
Building a survey

- Create survey
  - Build or copy
- Edit survey
  - Build questions from over 100 different question types
  - Format and customize questions
  - Apply question and survey options
Distributing a survey

• Basic Distribution
  • Anonymous survey link
  • Email customized link using the Qualtrics Mailer
• Panels
  • Mailing or distribution list
  • Embedded data
• More Distribution Methods
  • Social Media
  • In-page Pop-up
  • Website Feedback
View results

• View Reports
  • Filter and drill down
  • Export and share

• Responses
  • Recorded Responses and Responses In Progress
  • Retake Survey link

• Download Data
  • .CSV, SPSS, etc…

• Data Analysis & Crosstabs
Additional Resources
Learning the System

• **On-campus training**
  - Office of Institutional Research offers customized training sessions to address any unique or specific training needs not covered in the Qualtrics online training.

• **Qualtrics Resources**
  - Qualtrics provides complimentary training, support and online resources to help you learn the Research Suite.

• **Qualtrics University website:**
  - Online Training Program
  - Basic and Getting Started
  - Data Analysis Guides
  - Downloadable eBooks
  - Reference Guides
Support

• **On-campus support - Office of Institutional Research Survey Team**
  - Email the IR Survey Team: ir-qualtrics@csustan.edu
  - Visit the IR Qualtrics Survey Software webpage: http://www.csustan.edu/IR/QualtricsSurveySoftware.html

• **System help**
  - The yellow “Help and Tutorial” link within the Qualtrics system that will direct you to all of the helps that are available.

• **Qualtrics support**
  - Call 801.340.9194
  - Email support@qualtrics.com
  - Tweet questions @qualtrics
  - Facebook at www.facebook.com/qualtrics
  - LinkedIn (Qualtrics Users) www.linkedin.com
Survey Project Support Services
Levels of Survey Project Support Services

- Level 3
  Research Partnership
- Level 2
  Technical Assistance
- Level 1
  Consultation and Support
Consultation and Support (Level 1)

- What are the **objectives** of the survey?
  - Does the objective fit with the University Strategic Plan?
  - What are the critical questions to be answered?
  - Is a survey the appropriate data collection method?
  - Why is this study important? “*Will the juice be worth the squeeze?*” (Terenzini, 2013)
- What **information do you need** to answer your question(s)?
  - Does the information already exist? (e.g., existing survey data, institutional data)
- How will the **results be used**?
  - Who will be the audience for the results?
  - Who will be affected by the results?
  - Can the results be responded to proactively?
- How much **time** is needed?
  - Define topic
  - Identify the population and select sample
  - Develop instrument
  - Obtain IRB approval, if necessary
  - Pilot test the survey
  - Administer/distribute the survey; plan for follow-up
  - Analyze, interpret, and report
  - Make decisions or implement change
Technical Assistance (Level 2)

- Providing **access to** and **resources** for Qualtrics

- **Basic** training

- Assist with **basic building** of the survey instrument in Qualtrics

- Survey **management**
  - Distribution, including uploading panels/distribution lists
  - Monitor survey progress
  - Send reminders and thank-you messages

- **Basic** statistical analysis
Research Partnership (Level 3)

- Full consultation and support services
- Help client collect **usable survey data** that is “sufficiently accurate, timely, and collected systematically.” (McLaghlin & Howard, 2004)
- **Identify and define concepts**
  - “An approximate answer to the right question is worth a great deal more than a precise answer to the wrong question.” (Tukey, J. as cited in Suskie, 1996)
- **Collect data**
  - Survey development; basic and advanced building of the survey instrument in Qualtrics
  - Survey management
- **Restructure and analyze data**
  - Quantitative and qualitative analysis, peer group and/or trend analyses
  - Bring in data from other sources (e.g., ERS data, ArcGIS data)
- **Deliver and report** information
  - Reporting, including feedback on draft articles, texts, or presentations
  - Support interpretations of the results
- **Use and influence knowledge**
  - Help to determine the changes and the possible outcomes of the changes.
  - “Joint participants” in decision-making (Leimer, 2012)


