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Surveys as conversations between makers and takers: A conversational framework for assessing and responding to community needs

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Abstract

Surveys, commonly employed in the social and behavioral sciences, are practical tools that can be used to assess the needs and attitudes of a given population. If not implemented in thoughtful ways, however, surveys can be inefficient or even harmful. With surveys often informing critical policy decisions, survey administrators must make careful methodological choices in order to obtain meaningful results and make sound decisions. In this paper, we review the social scientific literature on survey administration to aid policymakers, practitioners, and other survey administrators in understanding their *position*, identifying their *participants*, and establishing a *plan* for their surveys. We provide an overarching framework for survey design, guided by the idea that surveys are conversations between administrators and participants, in order to help creators of surveys make better decisions and engage more effectively with the communities they serve.

INTRODUCTION

Everything changed in the spring of 2020. The emergence of the novel coronavirus led many organizations to pivot their operations to adapt to the global pandemic. Changing day-to-day operations is no easy feat. Organizations needed to be able to rapidly assess the situation and determine how to provide different kinds of support, and they needed to gather the necessary information to provide that support while respecting those they were engaging with. Whether they realized it or not, organizations were having multiple *conversations* with many people, often at large scales.

These conversations were not always easy, nor did they always go well. We will share an example to illustrate what we mean. In May of 2020, a social service organization decided that it would be useful to assess how the people in their community were doing in the wake of the COVID-19 pandemic. They wanted to assess whether community members were experiencing food insecurity or whether they had lost their jobs so that the organization could determine the best ways to help meet people's needs. The organization expected that there might be racial disparities in how the pandemic affected the community and hoped to gather demonstrative data to apply for special funding opportunities to address these disparities. They distributed a survey via Facebook and received a few hundred responses. When they examined the data, however, they realized that responses were primarily from middle-aged White women; their sample was not diverse enough to tell them anything about racial disparities. Furthermore, the questions they asked did not provide much useful information for guiding their mission of providing quality aid to underserved communities – many of the questions were presented with "yes" or "no" as response options, leaving participants with little room to elaborate on their needs. So, the organization spent time fielding a survey, and participants spent time completing it, but all of that effort was to no end – data from the survey were ultimately never used.

Examples like this are not new, nor are they unique to the pandemic. We are a team of academic social scientists who frequently conduct research in partnership with organizations and policymakers and thus have heard of and witnessed issues like this many times over the course of our collective careers. But these stories reveal an important issue that we want to discuss and help others to prevent in the future. Organizations often distribute surveys hoping to receive information from the constituents they serve without fully reflecting on their goals, the strategies that would need to be implemented to achieve these goals, and the relationships between the organizations and the people they are communicating with. These relationships govern the logical flow of the *conversation* between the people or organizations administering the survey and the participants filling it out.

Surveys are like other forms of conversation and must follow the same general principles that govern conversational dynamics (Grice, 1975). Survey administrators should be as clear in their communication as possible, giving participants as much information as is needed to answer the questions being asked, and no more; they should be truthful and transparent about their goals; the questions asked should be relevant to the goals communicated by the people or organization asking the questions; and surveys should be as clear, brief, and orderly as possible, following a logical sequence that participants can understand (Schwarz et al., 2010).

Implementing these conversational principles, however, requires critical reflections about the characteristics of the *source* (survey maker), *audience* (survey taker), and how the pre-existing relationship between the two (or lack thereof) might affect the content and its interpretation (Clark & Schober, 1992; Lewis & Wai, 2021). The goal of this paper is to review research on the cognitive science of surveys to offer a framework for practitioners (and researchers who may partner with them) to conceptualize surveys as *conversations*. We do this in the hope that such a framework may help readers understand how the relational dynamics that exist between survey makers and survey takers ultimately shape the *outcomes* of surveys, and thus what can – and importantly, what cannot – be done with survey results (IJzerman et al., 2020). By approaching surveys as conversations, we can avoid common pitfalls and maximize the benefits that surveys offer.

We employ the metaphor of surveys as conversations here because conversations are a fundamental mode of communication and information exchange familiar to all. Previous researchers have laid the foundation for the idea that survey participants "rely on the tacit assumptions that govern the conduct of conversation in everyday life" (Grice, 1975; Schwarz, 1999, pp. 94). Here, we build on this metaphor to apply it to the perspectives of both survey makers and takers, as surveys offer both of these groups opportunities to communicate ideas to one another. Surveys are like conversations in the sense that they are a relational medium of information exchange, prompting reciprocal sharing of ideas and feedback between survey makers and takers. When conversations go well, they can feel natural, reciprocal, and productive for all parties involved. The most natural conversations, such as those with close friends, require little planning to make all participants in the conversation feel good. On the other hand, conversations involving power dynamics or more complex goals – for example, a conversation between an employee with an issue at work and their human resources manager – can often go wrong if participants in the conversation are not communicating clearly or honestly (Stone et al., 2010). The most effective conversations of this genre involve participants who are aware of their goals and are in a position where they can voice their opinions to someone who can respond in an effective manner. Even though conversations like this can be challenging, they can also be extremely effective when participants in the conversation are able to meet their goals. Many people in the position of administering a survey are in situations that require these types of complex conversations with participants. Our aim in using this conversational framework is to apply the principles that guide complex conversational dynamics to the process of survey design, helping survey makers administer surveys with greater clarity and effectiveness.

While we argue for the adoption of a conversational framework, we also acknowledge that there are some ways in which surveys are *not* (and should not be) like conversations. For example, many conversations are casual and informal in nature, and often, conversation partners do not have any particular goals. We want to clarify that survey administrators should *not* aim to make their surveys more informal or "conversational" in nature. Instead, we suggest that survey makers think about their surveys like the *difficult* conversations that they are: conversations that involve complex power dynamics and goals but that can be executed well when properly planned.

With a conversational survey framework in mind, survey makers can benefit from being abundantly clear about their goals and expectations before deciding to design or administer a survey. Too often, the goals of a survey are ill-defined. When goals are ill-defined, it becomes difficult to know which questions to ask and whether the answers to those questions will be meaningful. The same can be said of difficult conversations; without adequate preparation and clear goals, these conversations can go poorly, or we may avoid having them altogether (Stone et al., 2010). To prepare for such conversations, people often consider who they are talking to (e.g., a friend vs. a manager), their relationship to that person, and their plan for what they want to say. For example, people approach conversations differently depending on whether they are talking with their friends, their manager, their co-worker, or their child's school principal. They also prepare for those conversations differently depending on whether they are confronting a friend after an argument, asking their manager for workplace accommodations, discussing grievances with a co-worker, or addressing their child's missteps at school. Applying these concepts to the survey design process, we propose that survey makers should think carefully about their *position*, their *participants*, and their *plan*. By defining each of these features in preparation for fielding a survey, potential survey makers will be able to assess *whether* they should indeed administer a survey and, if so, *how* to do so effectively (see Table 1).

Within each of the sections of this paper, we review research from psychology, communication, sociology, and related fields as it pertains to improving survey design and implementation. In addition to referencing relevant research, we also draw from our collective experiences as

TABLE 1 Survey makers need to reflect on their position, their participants, and their plan before conducting a survey. In this table, we provide examples for each of these steps by presenting fictional stories about organizations who effectively reflected on these topics and used those reflections when administering surveys.

Component of Survey Design	Example
Position	Diversity Task Force In response to a conversation with a human resources representative, a senior partner at a law firm recently formed a task force to improve diversity, equity, and inclusion (DEI) within the firm. People in different positions within the firm – such as partners, associates, and administrative staff – volunteered to join the committee. During an early meeting, the committee set out to establish their goals. The committee discussed their position and recognized that they would not be able to directly change firm policies, such as how hiring decisions were made. On the other hand, the committee established that they were in a position to present recommendations related to these policies to organizational leaders who were in a position to implement changes. The committee also discussed how they were in a position to initiate programs that might benefit current employees at the firm, like pairing new associates with mentors and facilitating community discussions on topics like racism in the legal field. Once the committee established its goals, they decided that it would be useful to survey employees at the firm to see what kind of programs would be most helpful to them. In soliciting these opinions, the committee made it clear to survey takers that anonymous responses from the survey would be aggregated and presented to the senior partners to advocate for changes to firm policy, but that the committee itself would not be able to directly enact these changes. They also made it clear that ideas gathered from the survey would directly inform the committee's plans for future programming that did not require approval or buy-in from senior partners. Finally, the survey provided participants with an opportunity to share open-ended feedback and to indicate whether they felt comfortable with their anonymous responses being quoted and shared in the presentation to the partners. As a result of these decisions, survey participants understood the position of the committee and how their responses would be used, and they were confident that their feedback would be entirely anonymous.
Participants	Financial service provider A local organization that provides financial coaching wanted to increase their client retention. This organization had been working in the community for several years and knew the population that they served very well. They consistently observed that a large number of their clients that came in for a preliminary appointment were women with young children, but these new clients often did not come back for follow-up appointments. In order to reduce the high levels of attrition from this specific population, the organization wanted to understand the constraints and limitations that prevented people from returning for coaching. Recognizing that working parents would not be available to answer phone calls during work hours, they sent out a brief survey via email so that participants could respond at their own convenience. Knowing that their participants' time was limited and valuable, the organization informed participants that they would be entered into a raffle once they completed the survey. As a small organization, it would not have been feasible to compensate everyone, but they found a way to ensure that the participants received some benefit for their time. The responses from the survey revealed that parents had a difficult time finding childcare, which prevented them from being able to attend appointments. The organization decided to make its space more family-friendly by setting up a play area for children and welcoming parents to bring their children with them for their appointments. They sent a follow-up email to each participant notifying them of these changes based on the survey and encouraging them to walk in any time for a follow-up appointment.

(Continues)

TABLE 1 (Continued)

Component of Survey Design	Example
Plan	University COVID Reopening Survey In the wake of the COVID-19 pandemic, a team of university administrators were faced with the difficult decision of whether to hold classes in-person or virtually for the upcoming academic year. The administrators constructed a task force to create an action plan and implemented a survey to gauge the needs and concerns of the student body. They recognized that there would be health and logistical challenges for both virtual and in-person instruction, so they felt that hearing directly from students could inform their cost-benefit analysis for each option. The administrators planned in advance to collect data at multiple time points because the status of the pandemic was continuously changing. They actively made note of the current pandemic situation (e.g., local vaccination and infection rates) at the launch of each survey. Additionally, the task force created a thorough plan for analyzing the data, including appointing a leader for the statistical analysis and designing a plan for how the data would be summarized. They also discussed in detail how they would incorporate the opinions of the survey participants into their final decision-making process. The task force wanted the survey to be able to inform decisions on the modality of classes and the specific needs of students for different modes of learning. They expected that there would be mixed emotions about returning to in-person (balancing safety concerns and desire for an in-person experience), so they prioritized capturing a more nuanced picture. Instead of using yes/no response options, which would have forced the students to make a single choice, they used a range of open-ended and numeric scale questions to capture more detailed data. Additionally, the task force surveyed the broader community as well – including parents, instructors, and community members in the surrounding town – to assess their opinions on reopening, since they all had a stake in the final decision. After completing their analysis and summarizing the results, the task force reported their findings to the university administrators who shared the final decision with the broader public.

Note:

survey makers, survey consultants, and survey participants across academic and organizational contexts. We do so because the practical lessons that are needed to conduct effective research in real-world contexts are often missing from the academic research literature (see Premachandra & Lewis, 2022). What the academic literature reports most often is applicable to academic surveys: (typically) one-time surveys administered in relatively controlled settings (e.g., lessons learned from undergraduates in the laboratory: Baumeister et al. (2007). In order to improve broader applications of survey administration, we reference both academic sources and other sources of knowledge that may help us apply behavioral science insights to more complex organizational and community contexts.

Our recommendations focus on ways to improve survey conversations in the real world (i.e., for non-academic purposes) by providing guidance for survey administrators in organizational or other community contexts. While academic and non-academic surveys have much in common, they often differ in terms of what they seek to achieve (e.g., testing theoretical propositions vs. guiding policy decisions). That said, many academic researchers are involved or interested in community-based partnerships where a relational, goal-based approach to survey design is critical. With this in mind, the recommendations in this paper will be most useful for practitioners, organizational leaders, policymakers, and academics working in partnership with them.

UNDERSTANDING YOUR POSITION

People engage in conversations with others from different backgrounds, social groups, or status positions in society, and the relative positions of conversation partners can influence their behavior in the conversation and beyond (e.g., Becker et al., 2013). In survey administration, those initiating the conversation are typically in a position of decision-making power – such as policymakers, managers, community organizers, and other leaders – and may be interested in surveying their communities or constituents to assess their needs, especially in difficult times (Folz, 1996). For example, the onset of the global pandemic led many organizations to survey people to ask a number of questions (see Schuster et al., 2020): Have you been directly affected by COVID-19? Do you have access to quality healthcare? Can you perform your job remotely? These are reasonable questions for decision-makers in organizations to want the answers to, but wanting a rapid answer to a question is not often conducive to getting an informative answer.

In times of uncertainty, it is tempting to rush to field surveys to gather answers, but this approach can be misguided if not done carefully. People want their decision-makers to provide thoughtful responses and enact effective policies. When surveys are approached haphazardly, neither of these expectations can be met, as there are often tradeoffs between speed and accuracy (Heitz, 2014). Before fielding a survey, we recommend reflecting on and understanding your *position* to determine whether that is an appropriate course of action. In this section, we guide survey makers through the process of determining their position and communicating it to survey takers.

Assessing your position

Decision-makers must understand their position in order to establish what they have the power to do given the current context and situation (Corlett & Mavin, 2018). If you are a manager of an organization, for example, you may be in a position to implement policy changes. If you are a community member or organizer, you may be in a position to provide direct aid or to advocate for policy changes but not to make these changes directly. Decision-makers may be in any number of positions, and importantly, this will depend on the situation at hand. For example, if your workplace has specifically created a task force to address issues of diversity and inclusion that is financially supported by your company, you may now be in a position to make recommendations relevant to hiring policies that you were previously unable to do. If your workplace created a task force to address issues of diversity and inclusion but *did not* give that task force a budget or any decision-making power, then that is a different position than the task force previously described.

Survey makers should also understand the extent to which they may be in a position of power, sometimes directly over their participants, and how that power is related to broader power structures in society at large (Karnieli-Miller et al., 2009; Milner, 2007; Ray, 2019). Power dynamics are inherent to relationships and will likely be apparent to survey participants who are often in the low-power position. Administrators should reflect on their past and historic interactions with prospective participants in order to understand the nature of this relationship, which will guide the dynamics of the conversation occurring through the survey (Schwarz & Oyserman, 2001).

Communicating your position

Just as in typical conversations, survey-based conversations should have a clear greeting and closing. In surveys, these "bookends" communicate everything that participants might need to know to decide whether or not they want to engage in this conversation with the survey administrators. When introducing a survey, administrators should include several key components, following the model of a typical informed consent procedure, including who is conducting the survey, their reason for the survey, plans for use of the data, confidentiality of the data, risks and benefits of participation, and administrators' contact information (American Psychological Association, 2017). Following the survey's completion, administrators should provide a conclusion and debriefing to adequately close the interaction. Administrators should also provide clear instructions if there are follow-up steps to be completed, offer instructions for receiving compensation (if compensation is appropriate in the survey context), and include any information that may have been withheld at the start of the survey[1]. Communicating these details may seem tedious, but doing so honors participants' agency and allows them to make informed decisions about their participation in the survey and the ongoing conversation with survey makers.

IDENTIFYING YOUR PARTICIPANTS

In conversations, we often have to identify the right person to bring our concerns to; personal matters might prompt a conversation with a friend, while workplace matters might warrant a conversation with a human resources manager. When it comes to surveys, survey administrators must also decide with whom they should be having a conversation in order for it to be meaningful and informative. Surveys allow administrators to learn about participants' perspectives and needs in order to make decisions in their best interest (Christopher et al., 2008; Kraft et al., 2018). In this section, we will discuss the administrator-participant relationship, exploring how survey makers can learn about their participants' perspectives and frame the survey as part of a larger conversation.

Who are your participants?

When surveying a group of people, it is critical to understand how their identities, perspectives, and social contexts will shape their engagement in the survey itself (Schwarz et al., 2010). For example, imagine a financial coaching provider is interested in understanding what factors influence retention in their program. They may survey respondents and find that women participants are less likely to return for subsequent coaching sessions. The survey administrators might then conclude that women have less of a need for or interest in their services. Taking context into account, however, administrators might discover instead that this is an issue of *access* rather than interest, as women may have more difficulties securing childcare or taking time off of work to come in for coaching sessions (Mattingly & Blanchi, 2003). By considering the interplay between identity and context, administrators can better identify barriers, ask about them, and learn how they shape participants' engagement with survey questions and with their environments more broadly.

Before conducting the survey, administrators should consider who is in their potential participant pool and how their social context affects their experiences. When possible, survey makers can try to access administrative data – for example, census or program data – which might include

[1] It is sometimes useful to withhold some information at the beginning of the survey in order to minimize response biases (See Sudman and Bradburn, 1982).

breakdowns of social categories that, due to historical and contemporary dynamics in society, might affect how those participants experience the survey and broader context (Cikara et al., 2022). These data can provide a first step toward understanding the perspectives represented in the group you choose to survey. Participant demographics might also influence survey administrators' choices for how to administer the survey. For example, if administrators will be interacting directly with participants, their own social identities (e.g., their race or age) may influence how participants engage with the survey (Cotter et al., 1982; Hatchett & Schuman, 1975; West & Blom, 2017). Furthermore, members of certain communities may speak different languages, so administrators may need to offer surveys in corresponding languages to ensure that relevant voices are represented in the results.

While demographic information can be informative, social categories do not always sufficiently explain potential differences in participants' experiences that might emerge during the survey process. As in the financial coaching example above, *contextual* factors surrounding social categories influence people's actions and decisions (Cikara et al., 2022; Oyserman et al., 2017). Consider that certain racial or ethnic group members in a given region may have complex and painful histories or present relationships with different government bodies or organizations, which may result in a lack of trust (see Koch, 2019). When survey administrators discover differences between social groups in their responses to a survey, they should investigate the social, cultural, and contextual factors that might explain these differences (Lewis & Oyserman, 2016; Sen & Wasow, 2016). Survey administrators' understanding of the relevant identities and contexts for a given population will also develop with time as they build longer-term relationships with the communities at hand.

How will you reach your participants?

Once administrators decide to carry out a survey, they must consider the best ways to reach their participants. Given the conversational nature of surveys, the communication mode and strategy that they adopt will influence how participants perceive and respond to requests for their input or information (De Leeuw & Berzelak, 2016). In our experience, if administrators already have typical means of communicating with prospective participants – for example, through an email newsletter – then this will likely be an appropriate mode to administer a survey because it will feel more natural given prior communications. Selecting a survey mode consistent with participants' expectations can also make the survey request seem more personal or legitimate, which will in turn affect how participants respond (Tourangeau, 2018). If administering surveys in situations where there has not been prior contact, it may first be useful for administrators to establish a relationship with participants in other ways. Here, administrators should also consider the power dynamics described in the previous section in order to approach participants in ways that build trust. Administrators may also need to use multiple outreach strategies and touchpoints to ensure that they reach a sufficient number of people and maximize the diversity of their sample, as different modes may reach different types of people (Tourangeau, 2018); if they intend to draw comparisons between groups of people, or to make inferences about a group beyond the specific people that they survey, they will need to collect data from a large and diverse sample (see Aberson, 2019). To make these choices, administrators should consider how participants will perceive and respond to requests sent via different modes and select the mode that is least likely to violate expectations, trust, or social norms (Burgoon, 1993).

In addition to determining the mode of outreach, survey administrators also must decide on the mode of the survey itself. Free tools like Google Forms and SurveyMonkey have made it such that most anyone with a reliable internet connection can quickly design and disseminate an online survey. Depending on the survey context, though, there may be tradeoffs to consider when deciding between an online or in-person (i.e., interviewer-administered) survey. In-person surveys may be appropriate when participants are particularly unlikely to respond to online requests, for example, among people with less experience with or access to technology. On the other hand, in-person surveys may require more time and resources, both from survey administrators and participants, whereas online surveys can be fielded easily and completed on participants' own time (see McMorris et al., 2009). In-person surveys may also be more likely to yield social desirability effects compared to the more private context of an online or paper survey (Dodou & de Winter, 2014; Nederhof, 1985). Surveying participants over the phone may also be appropriate depending on the context, though evidence suggests that this mode might increase social desirability bias and decrease the representativeness of the sample (Holbrook et al., 2003). Survey administrators should choose a survey mode that balances concerns about sample characteristics, response biases, and available resources in order to maximize the quality of their data and of participants' experience with the survey.

How will participants benefit?

Surveys require time and energy from participants, so participation may be seen as an inconvenient request. With this in mind, it may be useful to determine whether anything can be offered to participants so that surveys are reciprocal rather than one-sided (Maiter et al., 2008). For example, when feasible, administrators can offer monetary compensation to participants for their time (Ripley et al., 2010). If monetary compensation is not available or appropriate, administrators may be able to provide participants with information about resources that might be beneficial to them. Finally, if administrators understand how survey responses may directly inform decisions that help participants and their community members, they can provide further information about these plans to convey their positive intentions.

While fair compensation of some sort is necessary, administrators should also be careful not to *over*-compensate participants. When participants are offered more money (or resources) than necessary or reasonable for participation, this may affect participants' ability to appropriately consider the risks and benefits of participating (Largent et al., 2013). Survey administrators might seek out information from other local organizations or researchers in order to determine fair compensation for a given survey.

Building relationships beyond the survey

After the completion of a survey, survey administrators may want to continue the conversation in ways that allow both parties to listen and respond to each other over time. In these situations, ongoing interactions with participants should not be *transactional*, but rather *relational*, wherein administrators and participants engage in a mutually beneficial dialogue through surveys and other activities (see Glass & Newman, 2015). This approach allows administrators to gain a deeper insight into participants' needs and perspectives while also granting participants the assurance that the information they provide will ultimately benefit them.

In this way, the relationship between administrators and participants can be approached as a long-term conversation. Instead of using a sample of participants to get information, administrators can employ a long-term strategy for community engagement (see Moreno et al., 2009). If administrators are in a position to make decisions on behalf of participants based on the results of a survey, then they will benefit from having a rich understanding of participants' needs and desired outcomes.

While increasing the number of interactions between administrators and participants will often yield additional information (e.g., sending additional reminders about a survey to increase response rates), there may also be an upper limit to the ideal amount of communication (Schirmer, 2009). Administrators should do their best not to burden participants with additional points of contact unless they believe it would be necessary or helpful for all groups involved. In addition to being careful not to burden participants, survey administrators should also consider how their interactions might influence or bias participants' responses, for example, by coercing participants into responding (Schirmer, 2009). For this exact reason, researchers often take on a more detached persona when interacting with participants to ensure that each participant receives identical treatment (Given, 2008). On the other hand, engaging in a relational partnership with participants is a commonly used strategy in community-based research (Given, 2008). Depending on an administrator's goals, they should consider what tone or style of communication to take with their participants in order to promote trust, respect, and research integrity.

ESTABLISHING A PLAN

When approaching a difficult conversation, people do best when they have a concrete plan: an appropriate time and place for the conversation, a goal for what they hope to get out of it, and even a plan for the specific points they hope to convey (Stone et al., 2010; Zúñiga & Nagda, 2001). Similarly, once survey administrators have established their position and their participants, they must formulate a *plan* for how they will conduct the survey and what they will do with the findings (Meyer, 2018). In our experience, survey administrators often wait to create a plan of action until they already have participant data on hand. Without a clear plan, survey administrators risk asking the wrong questions. This results in survey data that cannot ultimately be used, which wastes the time and energy of survey participants and administrators alike. Survey administrators can often benefit from reflecting on questions related to eventual use of the results, such as: Are you planning to use your survey to make policy recommendations to another person? Will you use specific questions in your survey to directly make policy changes (e.g., if more than 50% of your participants support an institutional change, will you implement it)? How will you share a summary of the results back to the survey participants? Do you have hypotheses about certain patterns you expect to see in your data that you would like to test? In developing an action plan that answers these questions, survey administrators will be able to clarify their goals and write survey questions in a way that provides the most informative answers (see Church & Waclawski, 2017). Of course, plans change, and new questions (or surprising answers) are likely to emerge during the survey process. Administrators can always return to their initial plan and update it as they gain new information.

What do you want to learn?

> "The evaluator's key task is to ask clear questions about meaningful behaviors in a setting that allows for candid reports." (Schwarz & Oyserman, 2001, pp. 129)

Question-asking is a central feature of conversations, as questions create opportunities for people to get to know each other and develop relationships (Huang et al., 2017). Similarly, surveys seek to capture a snapshot of participants' reality by asking them questions about their experiences, feelings, beliefs, and behaviors. When we ask survey questions, we expect participants to interpret the questions as we intended and then apply that interpretation to their situation and provide an answer that reflects their reality (Schwarz & Oyserman, 2001). However, this reality is a function of how we ask questions and the psychological and structural context participants are in when they answer these questions. The complexity of these intersecting factors can result in a divergence between what administrators expect of participants and what they actually get. Although these discrepancies cannot be completely eliminated, contextualizing the survey process as a conversation between administrators and participants can help to minimize the divergence. One way of facilitating such a conversation is to ask meaningful questions and to make space for participants to provide meaningful responses (Schwarz et al., 2010; Schwarz & Oyserman, 2001).

There are various social and psychological factors to consider when writing survey questions. In this section, we highlight some of the factors that make it difficult for participants to provide informative and accurate answers to survey questions. We also provide suggestions for how survey administrators can avoid these pitfalls by crafting better questions.

Priming and framing

In the ideal world of a survey administrator, participants answer questions as objectively as possible, uninfluenced by features of their immediate context or other parts of the survey. However, participants can be primed or cued to respond in certain ways based on the content of each question and cues within the overall survey. For example, the name of the institution distributing the survey might lead participants to make guesses about what the survey administrators are hoping to learn, leading people to inadvertently respond in socially desirable ways (Schwarz & Oyserman, 2001).

Wording choice in questions can also influence participants' responses or lead them to certain conclusions (Hauser & Schwarz, 2018). For example, participants in a study rated a bank's slogan more positively when the slogan used the word *lend* versus the word *loan*, as *lend* tends to be used in more positive contexts (Hauser & Schwarz, 2018). Similarly, administrators' word choice in surveys may subtly prompt participants to think about more positive or negative aspects of their experience or may influence their evaluations of a program.

Depending on the goals of the survey, administrators should assess their surveys for these potential influences, weigh the costs and benefits of including or excluding certain questions, and make note of these decisions so that they can reference them during data analysis.

Intentions versus behavior

Surveys are often used to predict what people will do using what they say, a practice that assumes a strong relationship between reported intentions and actual behavior. However, there can be large gaps between what people intend to do and what they actually do (Sheeran & Webb, 2016). One way to minimize the divergence between intentions and behavior is to consider what participants may think is the socially desirable response. For example, participants may be likely to report an intention to donate money to a local non-profit because it is a generous thing to do. However, whether or not they act on that intention will depend on when they get their next paycheck. To minimize the difference between intentions and behavior, administrators may wish to provide participants the opportunity to participate anonymously and confidentially (e.g., via an online survey as opposed to an in-person survey; Nederhof, 1985). Survey administrators can also use seriousness checks – questions that ask participants about the seriousness of their participation – to exclude nonserious participants, which can increase consistency in attitudinal and behavioral data (Aust et al., 2013). Unfortunately, even serious participants in anonymous contexts may still provide socially desirable responses, and survey administrators should consider this bias when interpreting their results.

Participants' reported intentions and behaviors may also be influenced by larger social events and trends (Healy et al., 2010). When conducting a survey, administrators may consider keeping a log of media events and changes in participants' environments leading up to and while administering the survey. For example, in a pandemic, when people's perceptions of the world are updated on a regular basis depending on infection rates, social norms, and more (Hensel et al., 2022), basing organizational re-opening decisions solely on surveys taken months before may create inconsistencies between reported intentions and actual behaviors.

Finally, in a world of power structures and hierarchies, behavior may also be financially or socially constrained. While respondents may want to behave in certain ways and report their intentions as such, their capacity to act may be heavily influenced by others in their world. Surveying the system of stakeholders and factoring in any power dynamics when interpreting survey results will be useful in making more realistic predictions.

Specificity versus generalizability

The conclusions we can draw from surveys are inherently limited by the questions we ask. If administrators ask about a participant's opinion on one government service, they cannot make inferences about how they feel about all government services (let alone about the government in general) based on that question, and vice versa. While this may seem self-evident, we have observed that survey administrators sometimes ask questions at a level of specificity that does not match their goals. When designing survey questions, administrators should consider what they would like to learn from their participants and write questions in the way that most directly addresses that goal (Schwarz & Oyserman, 2001).

The response options offered to participants will also influence the level of specificity in their reports. For example, open-ended response options can sometimes prompt respondents to reflect on details of their experience that would not be captured in a standard closed-ended question; however, if they are too ambiguous (e.g., "What have you done today?"), participants may not provide meaningful responses (Schwarz & Oyserman, 2001). On the other hand, closed-ended questions (like checklists of behaviors or numeric scales) may prompt more specific responding but may not be as useful for capturing general evaluations (Schwarz & Oyserman, 2001).

Memory constraints

The quality of survey research depends on the validity of participants' reports on past behaviors or events. Unfortunately, people often make errors when reporting the frequency of their behaviors and when recalling the details of past events (Bradburn et al., 1987). Survey

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administrators can improve participants' ability to recall events by providing short reference periods (e.g., "last week") and offering cues pertaining to an experience (e.g., locations of events, people involved) (Belli, 1998). When asking participants to report on memories and past experiences, consider that memory is inherently flawed and that questions that require recall of specific memories, particularly memories of things that happened a long time ago, may be very challenging for participants.

How will you handle the data?

While we may not typically think of casual conversations as yielding "data," we do often have points from a conversation that we want to remember and act on. When conducting surveys, we similarly need to synthesize the information learned in the "conversation" to inform subsequent decisions.

Surveys attempt to capture the social reality of those answering the questions. However, when making inferences from survey data, we often overlook the complexity inherent in social processes and instead believe that the data, by nature, capture a one-size-fits-all representation of reality. We then proceed to make decisions on this premise when the data itself may be flawed. As such, we need to handle data in ways that recognize the flaws that impede evidence-based action.

People, not datapoints

We suggest that administrators see survey results not just as data points, but as snapshots of people's experiences, position, and context. This requires understanding the complexities of their responses and recognizing that there may be wide variation in attitudes across a survey population. This also means that survey makers need to be extremely cautious regarding how they share participants' data, as these datapoints may reveal personal information about participants (Meyer, 2018). In general, survey makers should take care to ensure that survey responses are anonymous and confidential by separating out any questions that might identify participants, storing the data in a secure manner (and limiting the number of people who can access it), and only sharing aggregate-level results.

Even surveys that seem anonymous may inadvertently leave open the possibility of re-identifying participants using their responses to open-ended or demographic questions (Golle, 2006; Lewis, 2020). For example, a survey focused on capturing employees' feelings about a new diversity initiative in the workplace may include questions about participants' demographic information. The responses of employees of color may be especially informative for this survey, but if there are few employees of color at the firm to begin with, then these participants may be very easily identified by their responses or by the other demographic information they provide (e.g., their gender, age, or position in the firm). Participants may even anticipate this risk and choose not to respond as a result. In situations where survey makers feel that collecting demographic information (or other information that might identify participants) is necessary for the purpose of their survey but might compromise participants' anonymity, they should take extra care regarding what they ask, who has access to the raw data, and how the data are shared and reported (Meyer, 2018). To further mitigate concerns about identifying participants in contexts like organizations (in which people may know each other), we suggest that survey makers designate a particular person or small team of people to read through participants' open-ended responses and remove any potentially identifying information before the data are shared with anyone else.

Who is missing?

"What is left out is as important as what is there." – Toni Morrison (1984, pp. 341)

When possible, administrators should take note of who responded to a survey while paying special attention to who is missing (e.g., by comparing expected population demographics to sample demographics or checking for patterns in drop-off during the survey). This missingness may be due to random chance, but it may also represent a more systematic bias due to how the survey was designed or administered.

When analyzing data with missing entries, administrators should understand that the people who respond to a survey may be different in some way from the people who do not respond (this phenomenon is called "non-response bias"; e.g., Hill et al., 1997). For example, in a study of survey bias in patient satisfaction surveys, patients who responded to the surveys differed from the overall population of patients in terms of age, gender, insurance status, and other sociodemographic factors, all of which have the potential to bias overall satisfaction ratings (Compton et al., 2019). Participants may choose not to response for a number of reasons, including concerns about being identified based on their responses or their demographics. Participants who complete a survey may also choose not to answer specific questions, resulting in non-response bias on particular items. When administrators receive a mix of present and absent responses on particular questions, they should consider that the responses may not be representative of the population. Survey makers should be cautious about generalizability in these situations and provide appropriate context when sharing results from surveys with missing data.

Survey administrators can reduce the likelihood of missing data by following many of the guidelines that we have already provided, such as making sure questions are asked as clearly as possible (de Leeuw, 2001). Survey administrators can also pilot their survey through a soft launch with a small number of people from their intended sample. By taking advantage of piloting, survey administrators are able to see how the questions they ask are received by their population of interest and if there are any adjustments that could be made to avoid non-response (Brooks et al., 2016; de Leeuw, 2001).

Triangulation

Triangulation is what social science researchers define as the process of using multiple methods and sources of data to obtain evidence (Mathison, 1988). Converging evidence helps to bolster validity of findings. Administrators must remember that surveys are just one way of answering the questions they want to answer. Depending on their goals, resources, and constraints, they may want to complement their surveys with other forms of conversation to better understand participants' needs, such as focus groups and interviews (see Morgan, 1996).

People responding to surveys often do so believing that their input will be considered in subsequent decision-making. These motivations should not be taken for granted. A survey based on a conversational framework prompts *reflexivity*: an acknowledgment that you, as the survey administrator, are part of the process and that your own experiences and beliefs will impact the questions you ask and the inferences you make. Through this awareness comes an ability to recognize opportunities to engage with participants in ways that signal how much their time and effort is valued. This requires handling the data in ways that facilitate surveys and post-survey interactions geared toward guiding better institutional decisions.

Taking action

As discussed throughout the paper, survey conversations require more than just one round of communication between participants. As a first step, survey makers should not only make participants aware of how their data may be used, but they should also follow up after the survey to report their aggregated findings back to participants (see Israel et al., 2012). Again, survey makers must take care in this step to not reveal the identities of their participants, especially when they may be identified based on their minority status (e.g., as the only person of color in an organization).

In addition to reporting their findings, survey makers must also follow through by taking appropriate action in response to survey participants' expressed opinions and needs. Often, survey makers conduct surveys because they are interested in participants' input regarding institutional changes, and in turn, participants share their relevant concerns and recommendations. In order to ensure that participants' time is not wasted, survey makers then need to deliver on their plans to enact change based on their learnings. This is likely to be a long-term process, requiring additional conversations between survey makers and participants and potentially other methods of communication, like meetings or focus groups. Ultimately, this long-term exchange of knowledge and information will ideally result in organizational changes that reflect the values of members at all levels of the organization.

As long as survey makers have clear plans in place before administering the survey, then they should be able to take action in good faith based on participants' responses. If they have not followed a clear plan but have already administered a survey, we still recommend following up with participants to report on what they have learned in the aggregate. Following this step, survey makers should make additional plans to discuss how to better prepare for future conversations with participants and decide on ways to enact change based on the input they have received.

CONCLUSION

In this paper, we suggest that survey makers view their surveys through the framework of conversations. Relationships between survey makers and takers often exist in the broader context of hierarchical structures, underscoring the importance of building trust and acting in good faith when using surveys to make critical decisions. Similar to how people approach difficult conversations in everyday life, survey makers should understand their position, identify their participants, and establish a plan before fielding surveys. This requires survey makers to reflect deeply on *why* they want to conduct a survey: what they want to learn, what they have the power to do with the results, and how they will build lasting and mutually beneficial relationships with survey participants. Unfortunately, many survey makers field surveys quickly without considering these questions, resulting in wasted time and resources, eroded trust, and unhelpful data. By following the principles of this conversational framework, survey makers can avoid these common errors to form clear goals and plans, producing invaluable information for organizational decision-making.

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