

First, decide

- Monitoring form** Same people, as part of their work, again and again. Minutes, not a quarter of the visit.
- Evaluation survey** A sample, often with a comparison group, at baseline and endline. Core questions locked.

The SURVEY method

- S Scope: Start from decisions, not questions.**
Name each decision, who makes it and when · One indicator per decision · Draw the empty table each one fills
- U Unpack into questions: Write it the way the person answering would say it.**
One idea per question · The words of whoever answers · A clear time period
- R Responses: Everyone finds exactly one answer that fits.**
Exhaustive options, no overlaps · Counts instead of vague words · Every scale point labelled
- V Validate the flow: Each person sees only what applies, in a sensible order.**
Consent first, sensitive later · Skip logic for follow-ups · Constraints on every number and date
- E Ethics and every language: Safe to answer, and the same meaning in every language.**
Only the personal data you need · IDs instead of names in reports · Two translations, reviewed together
- Y Yield-test: Real people use it before everyone does.**
Watch real people use it · Fix, then test the fixes · Checks that run every day or week

Every answer takes four steps

Understand → Remember → Judge → Respond. Find the step a question trips on, and fix that.

Ten wording rules

1. **One idea per question.** *Were the staff polite? / Were the staff quick?*
2. **Use the respondent's words.** *Has the problem you called about been solved?*
3. **Give a time period.** *In the last 3 months, how many times did you visit the clinic?*
4. **Stay neutral.** *How useful or not useful was the training for your work?*
5. **Ask about the person, not everyone.** *Does anyone in your household use the toilet at home?*
6. **Avoid negatives.** *Should school fees go up, stay the same or go down?*
7. **Ask what people can know.** *Has the road to your village been repaired in the last year?*
8. **Avoid absolutes.** *Yesterday, before eating, did you wash your hands?*
9. **Keep it short.** *Which of these services did you receive?*
10. **Prefer tested questions.** *Use the Washington Group Short Set*

Answer options

- Counts beat vague words
- Label every scale point
- Plan for not knowing
- Fit recall to memory
- Exhaustive and exclusive
- Item-specific over agree-disagree
- Forced choice over check-all
- Keep open questions few

Order: consent, screen, easy facts, core topic, sensitive with privacy, background, thanks.

Modes, rules of thumb

- Face to face** Up to about 45 minutes; use show cards for long lists and scales
- Phone call** Under about 20 minutes; read no more than four or five options
- Online, self-completed** About 10 to 12 minutes; one question per screen on phones
- SMS** About 5 to 10 short questions; one idea per message, answered with a single number
- Voice (IVR)** About 5 minutes; two or three options per question, pressed as 1, 2, 3
- Paper** As short as possible; print skip instructions next to the answers ("if no, go to q8")

With AI: six promises

1. **Every question earns its place.** Each one feeds a decision and a planned table.
2. **No respondent data goes in.** No names, phone numbers or raw answers in an AI tool unless your organisation approved it.
3. **Standard questions come from the source.** Copied from the official document, never from AI memory.
4. **Translations are reviewed.** Fluent reviewers decide, and every choice is noted.
5. **Logic is tested on a device.** By people walking every path before launch.
6. **AI help is disclosed.** The methods note says what AI drafted and who checked it.

Before launch

- Every question feeds a decision or an evaluation question
- Standard modules copied from the source
- Options exhaustive, with honest exits
- Logic tested on a phone by three people
- Consent script and privacy plan agreed
- Pilot done; timings known
- Version number and change log in place

In the field: daily checks by interviewer; back-check one in ten; separate codes for don't know, refused and not asked; share results back.