

Campus Survey Coordination Guidelines and Procedures

(Cabinet Approval: 05/24/2021)

I. University-wide Survey Coordination Guidelines

Surveys of campus constituents (i.e., students, faculty, staff, and alumni) are widely recognized as an important means for collecting information to support and assure educational quality, enhance institutional effectiveness, and improve the student experience. The purpose of these guidelines is to ensure that university surveys of campus constituents are conducted in a manner that minimizes redundancy and frequency of surveys and follows guidelines for survey deployment. To achieve these goals, all University surveys of campus constituents will be coordinated through the Office of Assessment and Institutional Effectiveness. These guidelines define the coordination procedures for these surveys.

These guidelines apply to any survey of campus constituents except:

1. Surveys designed to solicit feedback from participants regarding a specific campus event
2. Point-of-service surveys administered during or immediately following the service interaction
3. Course-embedded curricular evaluations/assessments or operational assessments
4. Surveys conducted within the membership of an office, committee, faculty department, targeted alumni group (e.g., reunion committee) or student organization (such as student government surveying its elected members)
5. Surveys related to leadership performance evaluations or periodic reviews
6. Surveys involving only persons who are not CSUF students, faculty, staff, or alumni.
7. For these guidelines, fact-based administrative forms that individuals complete as part of routine business operations (e.g., directory information updates, scholarship applications, information technology help tickets, scheduling) and polls or ballots used for voting purposes (e.g., elections, resolutions) are not considered surveys, even if they are administered using survey software.

II. Purpose

These guidelines constitute a procedure for managing surveys on the California State University, Fullerton (CSUF) campus. The guidelines allow CSUF to engage in best practices that benefit both the University and survey users. The goals of the guidelines are:

1. To be thoughtful stewards of our community members' time and attention
2. To reduce survey fatigue and unnecessary survey proliferation
3. To evaluate and prioritize requests for access to students, employees, or alumni for research purposes
4. To encourage collaboration among researchers and practitioners on the use of existing data

III. Overview

Surveys are widely recognized as an important means for collecting information that can maintain and assure educational quality, enhance institutional effectiveness, improve student and employee experience, and contribute to general knowledge. For these guidelines, a survey is defined as a gathering of information through questionnaires, interviews, etc. to make inferences about a population. Under the Universitywide Survey Coordination Guidelines, all administrative and research surveys meeting the following criteria must be coordinated through the Office of Assessment and Institutional Effectiveness (OAIE).

- Any survey for which the sample comprises 500 or more prospective, current, or former students.
- Any survey for which the sample seeks to draw from populations that are less than 500 (e.g., a specific identity such as race or ethnicity, women in STEM).
- Any survey for which the sample comprises 50 or more prospective, current, or former University employees (staff, faculty, or administrators).
- Any survey for which the sample is randomly selected from a population of campus constituents.

Types of surveys exempt from this coordination process include:

1. Surveys designed to solicit feedback from participants regarding a specific campus event
2. Point-of-service surveys administered during or immediately following the service interaction;
3. Course-embedded curricular evaluations/assessments or operational assessments
4. Surveys conducted within the membership of an office, committee, faculty department, targeted alumni group (e.g., reunion committee) or student organization (such as student government surveying its elected members)
5. Surveys related to leadership performance evaluations or periodic reviews
6. Surveys involving only persons who are not CSUF students, faculty, staff, or alumni.

Individuals who wish to administer a university survey to students, faculty, staff, or alumni must submit a completed and Dean/MPP (or designee) approved Survey Permission Request form at least 3 weeks in advance of the desired survey launch date. If approved, the survey will be added to the University Survey Calendar maintained by OAIE.

Approval by OAIE to administer a survey is not a substitute for a review by the Institutional Review Board (IRB). If a survey research project is subject to review by the IRB ([visit IRB](#)), approval is required before it can be administered within the University.

IV. What constitutes a survey?

A survey is a structured series of questions that are addressed to a group of persons to understand patterns in that group's attitudes or experiences. Surveys take the form of written or electronic questionnaires but do not include interviews or focus groups. A questionnaire will be considered a survey based on the information it elicits, regardless of its length. Even one-question surveys are subject to review if they ask for information about CSUF community members' attitudes or experiences with the intent of analyzing the information to understand broader patterns.

Surveys may be administered using paper and pencil, phone, or electronic format. Regardless of the method used, all surveys must be approved by OAIE before the survey can be administered except those specifically exempted by this policy.

Acceptance of authorization to administer a survey establishes an obligation on the part of the researcher to use these data responsibly, per University policies for handling data. See [Information Security Office](#).

V. University Survey Permission Request Process

1. Before submitting your Survey Permission Request:

- a. Visit the [Survey Repository](#) to ensure the information you are seeking is not already available.
- b. Consult the [University Survey Calendar](#) to select administration dates that minimize overlap with existing surveys.
- c. Finalize your survey in the format you intend to administer it.
- d. Confirm your survey content, communications, and administration plan with collaborators and obtain Dean/MPP (or designee) approval.

2. Submitting your University Survey Permission Request

Individuals internal to CSUF wishing to conduct a survey that is covered by the Survey Coordination Guidelines must complete and submit the online Survey Permission Request form at least 3 weeks in advance of the proposed survey launch date.

Information required for the Survey Permission Request includes but is not limited to:

- Description of the survey project, including the purpose and intended use of results;
- Specific population receiving the survey;
- Administration schedule, including beginning and end dates; and
- Final draft of the survey.

3. Individuals external to CSUF wishing to conduct a survey of CSUF campus constituents (i.e., students, faculty, staff, and alumni) should contact the Office Assessment and Institutional Effectiveness at data@fullerton.edu to discuss.

4. OAIE will review the Survey Permission Request form and respond to the applicant within five business days of the date the proposal was received. OAIE will review the application based on the following criteria:
 - Usefulness of data to inform University decisions
 - Timing of survey administration
 - Target population
 - Existing data availability
 - Opportunities to combine with other planned surveys
 - Sufficient survey construction (clear, appropriate questions). OAIE assistance can be provided, given sufficient notice.

5. Before approval, OAIE will offer recommendations for any revisions needed to align the survey with these criteria. If you have any questions about the survey policy, please contact the Office of Assessment and Institutional Effectiveness at data@fullerton.edu.

6. Approved surveys must be administered and used strictly as approved, without changes.

VI. Assistance with Survey Development, Administration and Reporting

OAIE will consider requests for assistance with the development, deployment and analysis of surveys conducted by academic departments, committees and task forces, and administrative units as time permits. Assistance with external projects (e.g., grant-related projects) conducted by CSUF faculty and staff may also be considered, but these will have a lower priority.