

# Designing Forms

<http://www.surveysystem.com/sdesign.htm>

## Question Types

Researchers use three basic types of questions: **multiple choice**, **numeric open end** and **text open end** (sometimes called "verbatim"). Examples of each kind of question follow:

### Multiple Choice

1. Where do you live?

- North
- South
- East
- West

### Numeric Open End

2. How much did you spend on groceries this week? \_\_\_\_\_

### Text Open End

3. How can our company improve its working conditions?

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**Rating Scales** and **Agreement Scales** are two common types of questions that some researchers treat as multiple choice questions and others treat as numeric open end questions. Examples of these kinds of questions are:

### Rating Scales

4. How would you rate this product?

- Excellent
- Good
- Fair
- Poor

5. On a scale where "10" means you have a great amount of interest in a subject and "1" means you have none at all, how would you rate your interest in each of the following topics?

- Domestic politics .. \_
- Foreign Affairs ..... \_
- Science & Health .. \_
- Business ..... \_

### Agreement Scale

6. How much do you agree with each of the following statements:

	Strongly Agree	Agree	Disagree	Strongly Disagree
My manager provides constructive criticism	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Our medical plan provides adequate coverage	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
I would prefer to work longer hours on fewer days	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

## 10 Steps to Simple Form Design

1. Start by asking the person (where appropriate) about their thoughts and preferences in this documentation effort. Include whenever possible.
2. Determine the purpose of the form. What information are you trying to capture? What do you want to know? Develop a sentence or two to describe this form.  
*"We are documenting Paul's walking for exercise time."*
3. Be clear about your intention. Why do you want to know this? Develop a sentence or two to describe this intention.  
*"Paul hopes to increase his duration from 10 minutes to 30 minutes and his frequency from twice a week to daily walks."*
4. Be clear about how you will use the results. Who will see them? Where will they be stored? How long will they be kept?
5. Develop a title. Descriptive and clear.  
*"Paul's Walking"*
6. Determine what to "count" / document and how best to count it. Also determine who should be the person counting.
7. Choose your questions/categories. Assure user-friendly formats and take advantage of checklists.
8. Be sure there is a place for the form completer to initial. This assures accountability.
9. Create the form. Consider whether you will use landscape or portrait. MS WORD Tables and EXCEL can both be useful programs.
10. Pilot (try out) the form. Review. Revise.

## **Jane's Top 10 Suggestions for Developing & Implementing Documentation Forms**

1. K.I.S.S. (Keep it simple, sweetheart/stupid)
2. Less is more
3. Be clear about what you are documenting and why you are documenting it. Remember what Marc Gold said... "We count because we care".
4. Always consider what you will do with the **results**. How will knowing this information enhance the quality of life for everyone involved?
5. Remember the Golden Rule: Do Unto Others as You Would Have Others Do Unto You
6. If at all possible, design the form WITH the individual and so that person can keep track of their own data
7. Make all forms easy to understand and complete
8. Title your form and include your reason for documentation so that those completing the form understand WHY they are completing it.
9. Include a sample/model of a completed form (clearly marked SAMPLE) demonstrating best practice.
10. Review and revise regularly. Do we still need this????? Or did we forget to stop?

### **Small Group Exercise:**

Think about the last 24 hours of your life.

Identify 3 areas in which documentation might have been kept if you were receiving services.

- 1.
- 2.
- 3.

Share your zones with your small group.

Together, choose one area to design a form around.

Using the paper provided, develop together a form that might effectively document your progress in this area.

Be prepared to share with the larger group and welcome feedback.