RESEARCH PROJECT LIFECYCLE

Full Research Plan: Questionnaires and Surveys

Stage: Research Development → Gate 3 · Other versions: Trials and Quasi-Experiments (the main Full Research Plan), Interviews and Focus Groups, Secondary Data Analysis, Mixed Methods

How to use this form

Use this version of the Full Research Plan when the main method is a **questionnaire or survey**. It sets out who you will ask, what you will ask, and how you will analyse the answers, **before any data is collected**. It doubles as your **pre-registration**. It takes **three to five pages**.

- **Who completes it:** the Research Lead.
- **Who checks it:** the Ethics Reviewer, then the Gate 3 Reviewer, as part of the Gate 3 Readiness and Project Sign-Off.
- **Questionnaires can collect numbers, words or both.** Closed questions and rating scales give numbers to count and compare. Open questions give words to code and theme. Plan the analysis for each.
- **Use tested questions where you can.** Validated scales and questions from national surveys let you compare your results with others.
- **Test before you send.** A short pilot with a few people catches confusing questions before they cost you good data.
- **Changes are allowed, but must be visible.** After sign-off, record every change as a dated amendment with the reason.

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A. The project

Most of this section carries forward from earlier templates. Check it is still right.

Field	Your answer
A1. Project title *(essential)* As on the Feasibility and Business Capability Assessment.	
A2. Project reference From the Research Portfolio Register.	
A3. Research Lead *(essential)* Name and role.	

Field	Your answer
A4. Gate 2 decision date *(essential)* The date the project was judged "This research project is feasible".	Date: _____ / _____ / _____
A5. Plan version *(essential)* For example, version 1.0. Every amendment after sign-off gets a new version number.	

B. Question and aims

Field	Your answer
B1. Research question *(essential)* The main question the questionnaire will answer. For example: "How satisfied are customers with the new booking service, and what would improve it?"	
B2. Aims or hypotheses *(essential)* What you want to find out. If you expect a particular result, state it so the results could prove it wrong. For example: "Satisfaction will be lower among people who booked by phone than online."	
B3. Why this matters *(essential)* A short summary of the evidence and the gap this study fills. Carry this forward from the Evidence Scoping Summary and update it.	

C. Design and sample

Field	Your answer
C1. Survey design *(essential)* Pick one. **Single survey:** asked once. **Before and after:** asked before and after a change or intervention. **Repeated over time:** asked at regular points to track change. **Within a trial:** used to measure outcomes in a randomised controlled trial or quasi-experimental design.	☐ Single survey ☐ Before and after ☐ Repeated over time ☐ Within a trial
C2. Who will be asked *(essential)* The group you want to learn about, and how you will reach them. Write it so someone else could find the same people.	
C3. Sampling method *(essential)* Pick one. **Everyone eligible:** all people in the group are invited. **Random sample:** people are chosen at random from a full list. **Stratified sample:** random within groups, such as age bands or areas. **Convenience sample:** whoever is easiest to reach. Results may not represent the whole group.	☐ Everyone eligible ☐ Random sample ☐ Stratified sample ☐ Convenience sample ☐ Other
C4. Target responses and expected response rate *(essential)* How many completed questionnaires you need, and the response rate you expect. Base the expected rate on similar past surveys, not hope.	

Field	Your answer
C5. How people are invited and respond *(essential)* Online, paper, phone or in person, and who sends the invitations.	
C6. How will you maximise response rate? *(essential)* A low response rate can stop the study answering its question, and the people who reply may differ from those who do not. List the steps you will take. For example: a short questionnaire, a trusted sender, advance notice, reminders, a format that works on a phone, or a thank-you for taking part. Say how you will monitor responses as they arrive, and what you will do if the rate falls below your target.	

D. The questionnaire

Field	Your answer
D1. Topics and measures *(essential)* The topics covered, and the measure used for each. Name any validated scales or questions borrowed from other surveys.	
D2. Question types The mix of closed questions, rating scales and open questions.	
D3. Length and time to complete *(essential)* Number of questions and how long it takes. Shorter questionnaires get more, and better, answers.	

Field	Your answer
D4. Testing the questionnaire *(essential)* How you will test it before sending. For example, asking five people to complete it and talk through anything unclear.	
D5. Accessibility and languages Easy read versions, translations, large print, or help to complete it.	

Attach the questionnaire to this plan.

E. Collection and data

Field	Your answer
E1. Fieldwork start date *(essential)*	Date: ____ / ____ / _____
E2. Fieldwork end date *(essential)*	Date: ____ / ____ / _____
E3. Reminders and incentives How many reminders, when, and any thank-you or incentive offered.	
E4. Data storage and anonymisation *(essential)* Where responses are stored, who can see them, and when names or other identifiers are removed.	
E5. Linking to other data Whether responses will be linked to other records, such as service use. If so, how, and with what consent.	

F. Analysis plan

Write this before any responses are seen. It is the core of the pre-registration.

Field	Your answer
F1. Main analysis *(essential)* How the answers to the main question will be summarised or compared. For example: percentages with confidence intervals, or a comparison between groups using a named test.	
F2. Non-response and missing answers *(essential)* How you will check whether people who responded differ from those who did not, and how you will handle skipped questions. Say whether you will weight the results.	
F3. Subgroup comparisons Only the comparisons you plan now. Anything added later must be labelled as exploratory.	
F4. Open-text answers How written answers will be coded and themed, and by whom.	
F5. What counts as a meaningful finding The size of difference or level of agreement that would matter in practice.	

G. Limitations

Field	Your answer
G1. Known limitations *(essential)* For example: low response rates, people who answer differently from those who do not, or questions that people may not answer honestly.	

Field	Your answer
G2. What the results can and cannot tell us *(essential)* A questionnaire shows what people report, not always what they do. On its own it cannot show that an intervention caused a change.	

H. Pre-registration

Register this plan before any data collection or analysis starts. See the ResearchCore guide "Where to Pre-register" for options in different fields, including internal registration and your own website.

Field	Your answer
H1. Where it is registered *(essential)* Pick one.	☐ External registry ☐ Registered Report ☐ Internal pre-registration ☐ Our own website
H2. Registry name and reference The registry, the ID or link, or the internal document reference.	
H3. Date registered *(essential)*	Date: ____ / ____ / _____
H4. Embargo until If the details are hidden until a later date.	Date: ____ / ____ / _____

I. Plan status and sign-off

Field	Your answer
I1. Plan status *(essential)* Pick one.	☐ Draft ☐ Ready for Ethical Oversight ☐ Signed off ☐ Amended after sign-off

Field	Your answer
I2. Signed off by *(essential)* Research Lead name and role.	
I3. Sign-off date *(essential)*	Date: ____ / ____ / _____
I4. Amendments after sign-off List each change: the date, the version number, what changed and why.	

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