Trinity University Survey Policy

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General Description

Policy Summary:

The Trinity University Survey Policy outlines the process through which members of the Trinity community, including faculty, staff, and students, may conduct surveys of University constituent groups. The policy also provides criteria for approving surveys, guidance for when survey approval is needed, a timeline for making survey requests, and information needed for survey approval.

Purpose:

The purpose of this policy is to ensure timely, useful, relevant survey data collection and analysis for decision-making and required reporting. The impact of this policy will be to reduce survey fatigue and support the collection of meaningful data. This policy will inform the planning and execution of large survey administration, analysis, and reporting.

Scope:

This policy applies to individuals or groups who want to survey a substantial number of Trinity faculty, staff, students, or alumni through direct requests (such as email or text messages)

The policy applies to surveys sent to current faculty, staff, students, and alumni. This policy does not apply to IRB-approved research surveys, nor does it apply to course-based or instructor-led student research involving fewer than 200 faculty, staff, students, or alumni respondents. It also does not apply to surveys sent to outside groups such as parents, community members, or other research subjects, nor to surveys administered through convenience sampling, such as those deployed through social media and QR codes.

Policy Content

Trinity Community Surveys

Campus surveys provide valuable data to help inform decision-making and strategic priorities for departments, units, divisions, and the institution. The Office of Institutional Research and

Effectiveness (OIRE) frequently conducts surveys of faculty, staff, students, and alumni to meet government or accreditation requirements and to evaluate institutional effectiveness. OIRE also provides survey support to departments and units, including survey scheduling, design, deployment, data analysis, and reporting. Surveys covered under this policy must be coordinated with OIRE and approved by the Vice President overseeing the division of the primary survey owner.

Determination of Surveys Covered in this Policy

The purpose, audience, and scope of the survey determine whether it falls under the Survey Policy. The table and examples below provide guidance for when to make a survey request of OIRE and the appropriate Vice President.

General Survey Purpose	Survey Request Required
Service, event, experience feedback	No
Convenience sampling surveys	No
Interdepartmental surveys or polls	No
Interest forms	No
Operational and Record-keeping forms	No
Academic program assessment, evaluation, program review	No
Instructor-led student research	No
IRB approved research	No
Focus groups	No
Course evaluations	No
Institutional effectiveness surveys (greater than 200 Trinity recipients)	Yes
Community feedback on campus operations, administrative performance, strategic priorities (greater than 200 Trinity recipients)	Yes
Employee satisfaction surveys (greater than 200 Trinity recipients)	Yes
Institutional assessment surveys (greater than 200 Trinity recipients)	Yes

Examples of surveys that **do not need** to make a request:

1. Surveys emailed to individuals who received a service (for example, tutoring, technology service, or a health/wellness visit).

2. Surveys for event feedback if emailed within 72 hours of the event and sent only to event participants.
3. Surveys that use convenience sampling, such as those conducted through QR codes, social media links, or surveys solicited in public areas such as the library or student union.
4. Academic research conducted by faculty or students, as well as online surveys conducted by students as part of an official course assignment.
5. Surveys conducted within the membership of an office, committee, faculty department, targeted alumni group (e.g., reunion committee), or student organization (such as the student government surveying its elected members).
6. Academic department assessment surveys (focused on student learning outcomes) of their majors and/or minors (current or alumni).
7. Surveys of department majors and/or minors (current or alumni) conducted for academic department reviews (often includes advisor feedback, department offerings outside of class, etc.).
8. Surveys that require IRB approval and are focused on a subset of Trinity students or employees.
9. Surveys sent outside the campus community are not included in this policy.
10. Polls for scheduling meetings
11. Elections
12. Registration forms for events or activities
13. “Interest forms” for capturing interest in future opportunities or further information (e.g., “Sign up if you’d like to receive info about intramural sports”)
14. “Crowdsourcing forms” for compiling information or resources (e.g., “Please share recommendations for vegetarian & vegan restaurants for Family Weekend;” “Please tell us which community organizations you partner with.”)
15. RSVPs for events
16. Administrative record collection (e.g., requesting phone numbers; personal health waivers)
17. Focus groups
18. In-depth qualitative interviews
19. On-site human-subject lab experiments

Examples of surveys that **do require** a survey request:

1. Student, faculty, and/or staff satisfaction, engagement, wellness, and safety surveys (>200 recipients)
2. Employee benefits, and/or feedback surveys (>200 recipients)
3. Administrative review surveys (>200 recipients)
4. Surveys to one or more campus groups (faculty, staff, or students) of more than 200 recipients

Timeline for Survey Request

One-time surveys
Survey requests should be made by these deadlines to ensure appropriate review and scheduling

Survey Deployment	**Request Deadline**
Fall Term	July 1
Spring term	October 1
Summer (June-August)	February 1

Requests for surveys that do not meet these deadlines will be reviewed and approved on a case-by-case basis and will be approved based on previously scheduled surveys and importance, as determined by the appropriate Vice President.

Recurring surveys

Surveys that require approval and are conducted on regular cycles, such as student satisfaction or employee satisfaction surveys, may be approved once and for all subsequent deployments, provided the timing, duration, scope, and purpose of the survey remain constant. A new request will need to be made if the timing changes to another semester or year, the length of time the survey runs changes by more than a week, or the purpose of the survey changes. The owner of the survey should contact OIRE with such changes.

Survey Request Approval

Once a survey request has been reviewed by OIRE, OIRE will forward the request to the appropriate Vice President for approval. Approval to conduct a survey will be based on

1. Institutional need (e.g., institutional planning, government and accreditation reporting, campus contracts)
2. Divisional or departmental need

3. Timing: Each group (faculty, staff, student, alumni) should be surveyed no more than twice per semester. Suggestions for alternative dates may be offered.
4. Uniqueness of survey data: If the survey is intended to collect data that the university already has access to from other surveys or other data sources, the requester will be supplied with the already existing data to determine if the new survey is needed.

Survey Request Required Information (Completed through a Survey Request link)

1. Ownership
    a. Name
    b. Department/Office
    c. Role
    d. Students conducting surveys sent through the Trinity email for populations greater than 200 must have a faculty or staff sponsor who completes this form.
2. Purpose and Background
    a. Survey title
    b. Survey population
        i. Community members (first-year students, all students, all majors within a school, all faculty, all staff)
        ii. Expected number of participants invited
    c. Purpose of the survey
        i. General purpose (student satisfaction, employee satisfaction)
        ii. Specific purpose (to understand student perceptions of engagement, to understand employee perceptions of benefits, to provide feedback for performance review)
    d. Survey instrument. If OIRE support is needed to refine questions, include sample survey questions and/or research questions.
3. Timeline
    a. Opening date of survey (or approximate dates)
    b. Closing date of survey (generally allow 1-3 weeks for the survey)
4. Support needed from the Office of Institutional Research and Effectiveness
    a. Contact list
    b. Survey question development
    c. Survey technical assistance (survey flow and structure)
    d. Survey deployment (sending invitations and reminders)
    e. Qualtrics training (completing reports, creating visuals)
    f. Analysis and reporting (generally allow three weeks from close of survey. However, the length of the survey, the amount of qualitative data, and concurrently running survey analysis may impact the timeline.)
        i. Quantitative data analysis
        ii. Qualitative data analysis

iii. Report writing

Review process

1. OIRE initially reviews applications to
    a. Ensure the survey is covered by the Survey Policy
    b. Provide alternative data sources from previous surveys if available
    c. Determine appropriate timing based on the survey calendar, academic calendar, or other factors that would impact response rates. OIRE may suggest alternative dates for survey deployment based on these factors
2. Survey requests are then sent to the Vice President of the division for approval. The VP approves a survey based on:
    a. Need for the survey based on:
        i. Institutional effectiveness assessment priorities
        ii. Institutional policy
        iii. Strategic planning priorities
        iv. Divisional needs
    b. Timing: Efforts should be made to limit the number of surveys any given group is asked to complete to two a semester. This does not include surveys that are excluded from this policy.

Terms & Definitions

Terms and Definitions:

Term:	Definition:
Convenience sampling	Convenience sampling is a type of non-probability sampling that focuses on collecting survey responses from participants who are 'convenient' for the researcher to access. Examples include those conducted through QR codes, social media links, or surveys solicited in public areas such as the library or student union.
Survey	An examination of opinions, behavior, etc., made by asking people questions. (Cambridge Dictionary)
Survey fatigue	Survey fatigue is a phenomenon that occurs when a given population is asked to complete too many surveys. It results in lower response rates, incomplete survey responses, and inaccurate or rushed responses, ultimately compromising the quality and usability of the results.
Response rate	The percentage of people who complete a survey out of the total number invited.

Revision Management

Revision History Log:

Revision #:	Date:	Recorded By:
v1	3/30/2026 10:44 AM	Pamela Mota

Vice President Approval:

Name:	Title:
Megan Mustain	Provost and Vice President for Academic Affairs