QUICK START GUIDE TO USING QUALTRICS TO EVALUATE AN ONLINE PROGRAM
April 2020

This document shows the quickest way to use Qualtrics for creating and distributing a survey to evaluate your online program – even with minimal familiarity with the tool. Use of a survey in the Qualtrics library is key to this process.

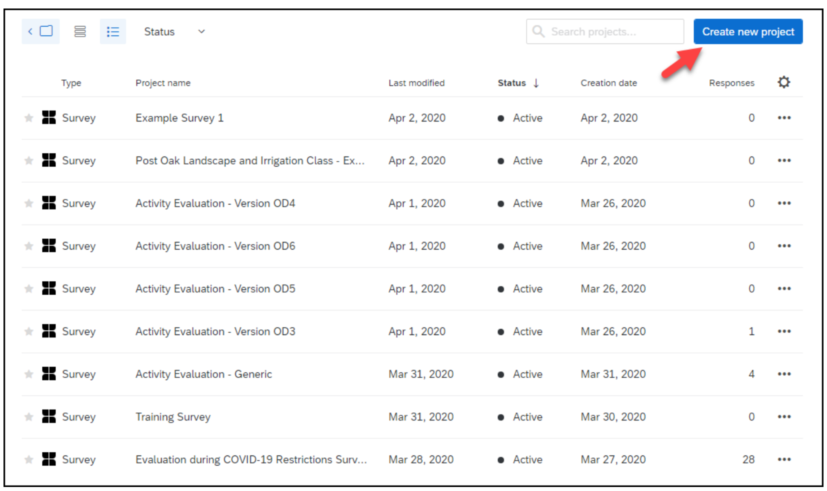
Note, before starting this process you must have your own Qualtrics account. Contact Organizational Development to start an account.

STEP-BY-STEP PROCESS

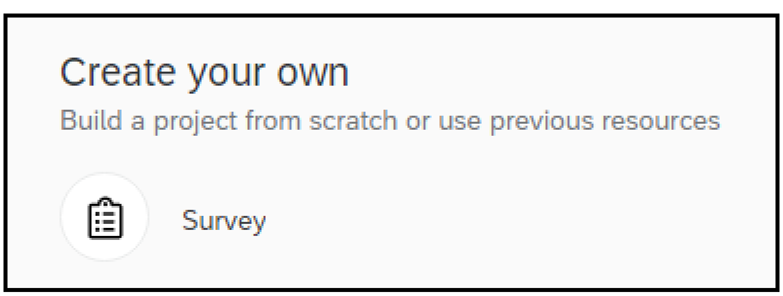
1. Decide which short survey from Organizational Development you want to use. Find a preview of each one here: http://od.tamu.edu/evaluation-resources/qualtrics-for-online-surveys/ (Short Surveys from Organizational Development in Qualitrics Library Section).

2. Log into Qualtrics at: https://agrilife.az1.qualtrics.com/login

3. Click on "Create new project" at the top left portion of the dashboard as shown below.

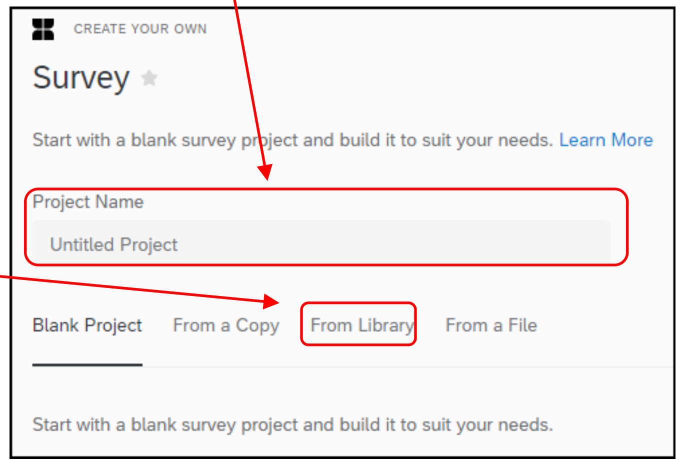


4. Click on "Survey" under the "Create your own."



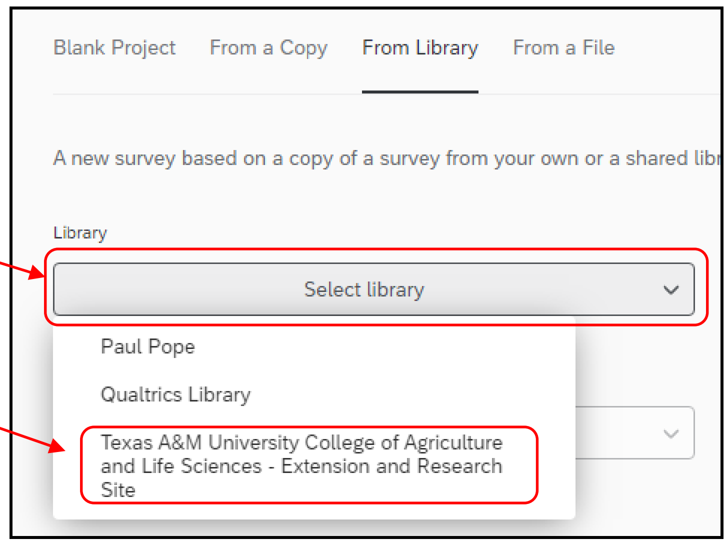
5. On the next dialogue window, first enter a name for the new survey. Do not enter a generic name like “Survey” or “Evaluation.” Be specific with a year, survey purpose, location and/or target audience if applicable. For example, 2020 Brazos County Hay Producers Online Seminar - Evaluation.

Second, click on “From Library.”



Third, click on “Select library.”

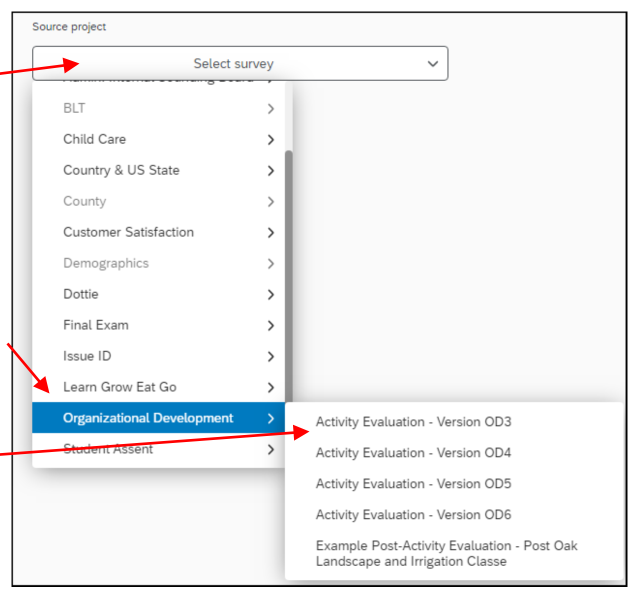
Fourth, click on “Texas A&M University College of Agriculture and Life Sciences - Extension and Research Site.”



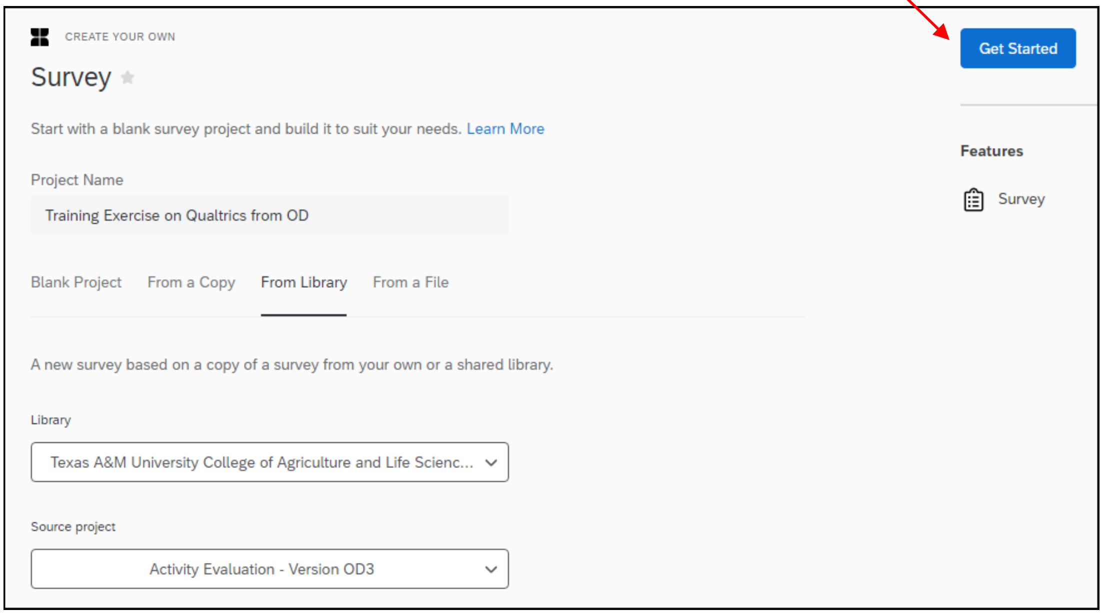
Fifth, click on “Select Survey.”

Sixth, scroll down the folder list and click on “Organizational Development.”

Seventh, click on the survey you want to use.

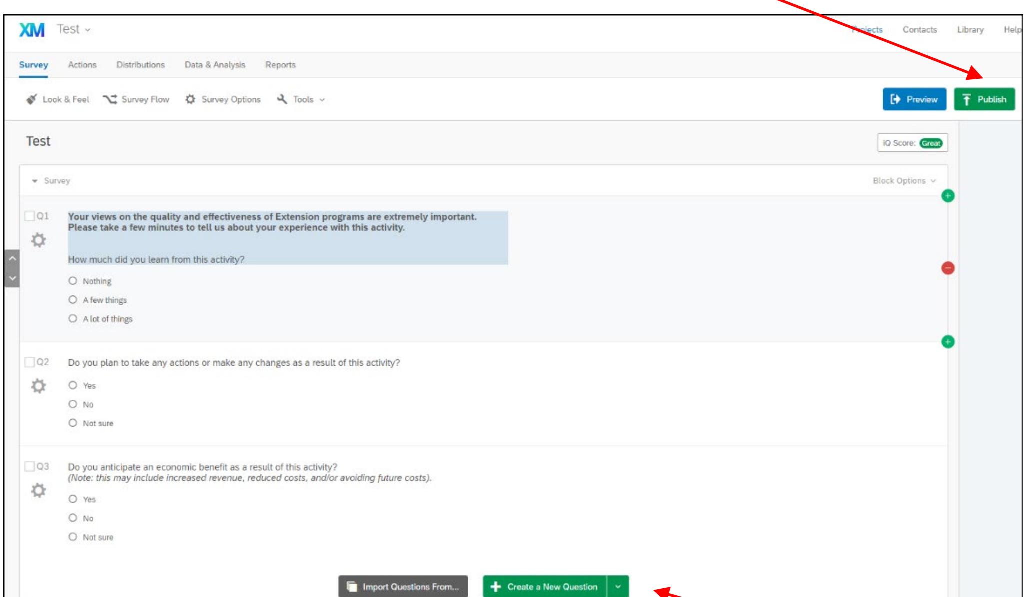


6. Click on “Get Started” at the top right to complete the process of selecting a survey from the Qualtrics Library



7. The survey you selected from the library appears in edit mode as shown below. Note the survey instructions are there (before Q1). If you click on “Preview,” you will see the complete survey. Notice <u>the agency logo at the top</u>.

   If you <u>DO NOT</u> want to add any other questions, <u>click on</u> “Publish.”



   If you <u>DO</u> want to add questions <u>and are already familiar with that process</u>, click on the green button “Create a New Question,” add your question(s), and then click on “Publish.” <u>Adjust your page breaks</u> as needed. For detailed instruction on adding questions, see the training guide, [Overview of Survey Question Types in Qualtrics](#).

8. After clicking on "Publish," Qualtrics generates a single, unique, anonymous link to your survey that all respondents use. Note the link includes AgriLife's Qualtrics URL plus a mix of numbers and letters as the example below shows.

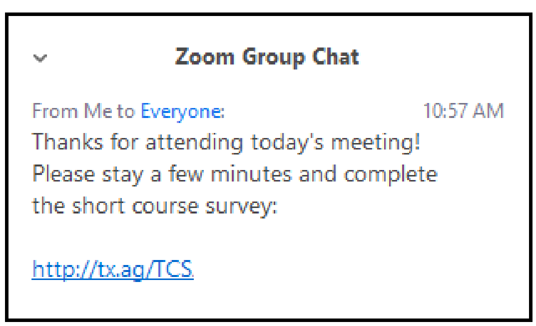
   This is the link to the survey you will share with program participants via email, online meeting chat area, or website. Right click on the link, select "Copy link address," and paste it into the application you are using to deliver the link.

9. Now it is time to deliver the survey to participants as part of your program evaluation. Most commonly, you will deliver the survey 1) at the conclusion of an online program via the chat area of your online meeting tool like Zoom or 2) via an email message after the program concludes.

   At the Conclusion of an Online Activity

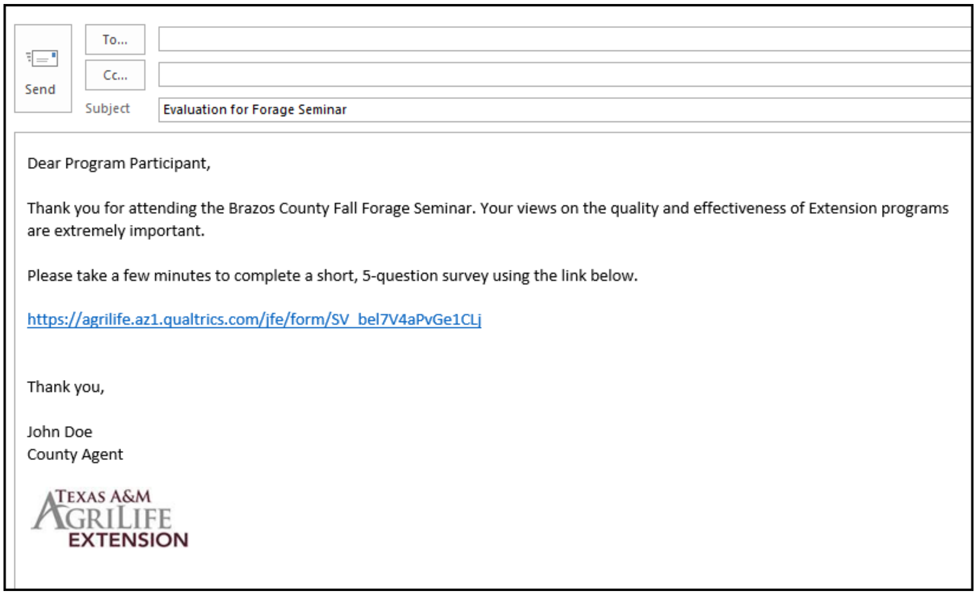
   - The meeting host can place the survey link in the chat area of the online meeting tool so it is immediately accessible to all participants at the end of the session. Two things make this process easier: 1) clear out the chat area if you are able to as host so the link stands out and 2) have the message already prepared in Word (including the link) so it is just a matter of copying and pasting the message from Word to the chat area.

     The host should ask (strongly encourage) participants to click on the link and complete the survey as a final step in the session **before** participants start dropping out the meeting. Make sure the link comes across correctly (it should be underlined as shown below). Here is an example using Zoom:



Using Email After a Program

- This process relies on having e-mail addresses for most or all program participants. Simply start a new message in Outlook, compose your survey invitation, include the anonymous link, enter the e-mail addresses of the individuals to receive the survey invitation, and send. Here is an example:


To...
Cc...
Send
Subject Evaluation for Forage Seminar

Dear Program Participant,

Thank you for attending the Brazos County Fall Forage Seminar. Your views on the quality and effectiveness of Extension programs are extremely important.

Please take a few minutes to complete a short, 5-question survey using the link below.

https://agrilife.az1.qualtrics.com/jfe/form/SV_bel7V4aPvGe1CLj

Thank you,

John Doe
County Agent

Texas A&M AgriLife Extension

- You can send a reminder email after a short period of time (perhaps 3 -5 days) to thank those who have responded and ask those who have not to consider doing so by a certain date. Note, with custom links (discussed in another document), you can automatically send a reminder just to those who have not responded.

- If you have a large email list, typing or copying them into the TO field of Outlook is not a viable option. Fortunately, there is a fairly way to import a list of email addresses from an Excel file into Outlook. Learn more here: http://od.tamu.edu/wp-content/uploads/2020/04/Copying-Email-Addresses-from-Excel-to-Outlook.pdf#zoom=100

- Be aware that an online survey sent to participants via email days after the conclusion of an activity often results in a low response rate (dramatically lower than those achieved with paper-based scan forms used in person). That has been the experience of many in our agency and with other cooperative extension services. Participants lose incentive, recall, and opportunity to complete an evaluation as time passes. It is best to direct participants to a survey as an online session ends (see previous section).

10. Once delivered, you can log into Qualtrics to see the number of responses you have to your survey. Use “Reports” to get basic information such as charts and frequency tables (discussed in more detail in another document).