Research Guidelines and Policies for Member Surveys

Prepared by the Institutional Research Committee

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The Society for Industrial-Organizational Psychology (SIOP) and its committees rely on member surveys to make decisions and carry out their work. By utilizing a data-driven approach and active solicitation of member input, SIOP leaders and members are able to make informed decisions that reflect the collective wisdom and perspectives of the entire society. This approach necessitates oversight to ensure:

- The needs to collect member data are balanced against the potential for survey fatigue among members.
- SIOP survey efforts are credible and protect member rights. Surveys must clearly demonstrate the benefits to SIOP and individual members of participating in survey requests. They must also adhere to consistent and high-quality survey standards, including sound construction and protection of the anonymity of individual member responses.
- The reporting and storage of data collected from SIOP members meet certain standards, including consistency in data reporting, storage and access to data.

The SIOP Institutional Research Committee (IRC) was formed to ensure this oversight and has developed a set of guidelines and processes (outlined below) to direct committee survey efforts.
SIOP Member Research Guidelines

The following provides guidelines to SIOP members and external researchers to direct their requests for the collection of survey data or the use of archived SIOP member data. While not intended to be exhaustive or immutable, these guidelines provide information that generally reflects the policies and standards to which individuals wishing to collect, analyze, or report on SIOP member data must adhere.

Survey Sponsorship

All surveys distributed to SIOP members must be sponsored by an active SIOP committee. The chair of the sponsoring committee must sign off on all survey efforts in order to initiate the IRC review process.

By sponsoring a survey, the committee chair agrees to ensure:

- The data collected are used to benefit membership as a whole
- SIOP members are burdened minimally with requests to provide data and are asked by SIOP to provide data solely to further SIOP business and/or strategic objectives
- Copies of data and other items relevant to archiving the data (e.g., copy of the survey with branching logic, variable list with response options and codes provided, content of email requests and information about any specific member

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1 For the purposes of these guidelines, any due-paying individual making up one of the six membership categories described [here](#) is covered under the term SIOP member.

2 Surveys that are not sponsored by a committee chair will not be distributed to SIOP membership and the email addresses of SIOP members will not be provided to third party researchers for non-sanctioned surveys. Other avenues are available to researchers who would like to directly solicit participation from SIOP members, including requesting participation through SIOP’s LinkedIn page or SIOP’s Calls and Announcements. No official SIOP communication channel (e.g., SIOP Newsbriefs, TIP, etc.) can be used to solicit survey response without prior IRC approval.
segmentation used to solicit response) are provided to SIOP’s IRC and the administrative office (AO) at the close of the study. Note that SIOP retains sole ownership of all datasets and derivative works and all data are considered confidential.

- Survey data are disposed of once such data have been securely transferred to SIOP’s IRC and the SIOP AO.
- Request to use archived versions of that data, at a later date, are responded to and where such requests represent a significant benefit to SIOP membership, the chair agrees to coordinate with the individuals making those requests.
- SIOP data are not used to develop articles, books, or presentations without prior approval of the chair of the sponsoring committee, who may at their discretion also require approval of the final product prior to publication.

Survey Scheduling

We recommend surveys be submitted for approval several months in advance of the desired survey launch date in order to increase the likelihood of launching on or near the desired dates. On occasion, the SIOP AO may need to adjust the scheduled dates for the distribution of survey invitations or reminders to accommodate other SIOP communications (e.g., communication about the conferences, TIP, etc.). There may also be instances where the AO and IRC may ask a committee to adjust its survey schedule to accommodate a different survey that meets an urgent need of the society (e.g., the executive committee needs data to make a pressing society-wide decision). Survey administration periods will not be allowed to overlap unless the surveys are being sent to different segments of the SIOP membership. Surveys will not be launched during major SIOP events (e.g., annual conference, LEC).

Survey Administration

SIOP committees wishing to administer a survey must use one of SIOP’s official survey accounts (e.g., Survey Monkey, SIOP cooperating vendor). In order to maximize the number of surveys that can be conducted, the administration period for each survey will
be a maximum of two weeks unless approved in advance by the IRC.

Survey Communication

All communication about SIOP surveys should be sent via the SIOP Administrative Office. Unless otherwise approved, each survey is limited to one survey invitation and one reminder email sent at the halfway point of the survey administration window.

The text of the survey invitation email should describe the purpose of the survey, the intended respondent, the sponsoring committee, the anticipated time commitment required to complete the survey, how the results will be used and reported, when the survey will close, and provide contact information for members who have questions about or are having difficulty with the survey. All SIOP survey invitations and reminders should clearly and explicitly state that the collected survey data will be made anonymous and aggregated whenever included in SIOP-approved reports and future archival research. If the survey data are identified, the nature of the identifiers and their use should be described.

Privacy Policy

With increased concern for protecting privacy, SIOP needs formal policies to ensure member data and survey responses are secure, protected, and maintained properly. As such, all individuals collecting SIOP member data must agree to remove personally identifying information and report data in the aggregate to protect member privacy. Generally speaking, aggregate values should only be reported for subgroups consisting of 10 or more respondents.

Survey Data Archiving

In order to facilitate the use of historical survey data, SIOP committee chairs will send a copy of the survey and cleaned survey dataset (i.e., data containing all coded variables with respondents not used for analysis flagged and anonymized responses) to the SIOP AO at the completion of a survey project for archiving on the SIOP servers.
Survey Results Dissemination

Results of SIOP surveys must be made available to SIOP members in order to ensure they are made aware of and benefit from the insights gained through the collection and use of their data. Appropriate avenues for disseminating such results include official SIOP publications, such as *The Industrial-Organizational Psychologist* (TIP), *Industrial and Organizational Psychology: Perspectives on Science and Practice*, SIOP’s white paper series, and other SIOP communication channels, such as SIOP’s annual conference, webinar series and SIOP technical reports.

Use of Archival Data

SIOP encourages member researchers (including students) to use its data for longitudinal or historical analysis and to avoid, where possible, overlapping requests for information from members. Researchers may request permission to use SIOP archival data by contacting the sponsoring committee for collecting such data and coordinating a joint request for its use to the IRC.³

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³ Current members of the same committee that initially authorized a survey may request the archival data from that survey directly from inader@siop.org without involving the IRC.
Survey Request and Approval Process

Step 1: Submit survey request.

The IRC review process is initiated by the sponsoring committee chair who should submit a completed survey request form via email to IRC@siop.org. This request should be completed using the official survey request form (see Appendix B). Each of the following should be described or included as part of the request:

- The nature of the survey including goals, length (i.e., the number of items and the anticipated time required to complete the survey), and the intended audience (e.g., all members, a subset of membership). If it is critical that the survey be administered within a certain window of time, this should be noted as well.
- The method by which the survey will be administered (e.g., Survey Monkey, SIOP cooperating vendor).
- A description of how the survey contributes to the stated goals of the committee, SIOP’s strategic goals, and/or will benefit SIOP members.
- A completed and signed SIOP Research Agreement – Surveying (see Appendix A).
- The text of survey communications, including the invitation and reminder emails. Note, the communication plan should adhere to the communications guidelines outlined above.
- A copy of the survey items and instructions, provided in a Word document, including explanation of any branching, routing, or dynamic text.
- An estimate of when and how results are expected to be analyzed and shared with SIOP members.
- The anticipated closing date by which final analyses of the data are expected to be completed, and when the final survey archival file will be submitted to the SIOP IT (lnader@siop.org).
- The plan for responding to members who have questions about or are having
difficulty with the survey, including anticipated response time.

Note, the IRC will confirm receipt of materials and/or request additional materials upon submission.

**Step 2: IRC reviews request.**

The IRC will then review and respond to the survey request within one month of receipt of all materials. Throughout the review process and upon IRC response, the sponsoring committee chair should address any questions or concerns received from the IRC in a timely manner.

**Step 3: If approved, survey is scheduled for distribution.**

Upon approval, the IRC will schedule the survey by adding it to SIOP’s survey calendar. If the survey request is not approved, the IRC will notify the sponsoring committee chair, who may then revise and resubmit the proposal.

**Step 4: Online version of the survey is created.**

The sponsoring committee works with the SIOP AO to create the survey in a SIOP authorized account (e.g., in Survey Monkey) or coordinate with a SIOP-approved survey vendor to author the survey.

**Step 5: Test the online survey.**

The sponsoring committee tests the survey and extracts or requests a download of the test data to ensure results are being captured correctly. Once the online version of the survey is finalized, the sponsoring committee provides a link to the online survey to the IRC for final approval.

**Step 6: Provide the SIOP AO all necessary information for survey launch.**

The sponsoring committee sends the following to the SIOP AO, cc’ing the IRC:
- Text for the finalized invitation and reminder emails, which should include the link to the survey and launch and close dates.
- The approved survey administration launch (invitation emailing) and reminder emailing dates.
- The segment of SIOP membership to which the survey should be sent (e.g., student affiliates).

**Step 7: Collect responses.**

Throughout the administration window, the sponsoring committee should be available and respond in a timely manner to members who have questions about or are having difficulty with the survey.

**Step 8: Protect SIOP member privacy.**

The sponsoring committee is responsible for extracting, or initiating a request for vendors to extract, data from the survey tool used. Upon receipt of data, the committee creates a usable data set that separates personally identifiable information (PII) from survey responses and destroys files containing PII or PII keys as soon as it is practical to do so. Immediately upon the creation of a useable data set (and backup), the sponsoring committee must notify the survey vendor to destroy its copy of all files containing PII or PII keys and/or delete data stored on SIOP survey platform immediately.

**Step 9: Analyze and report results.**

The sponsoring committee conducts analyses and publishes/communicates results to SIOP members through SIOP communication vehicle outlined in the initial request.

**Step 10: Archive survey data and delete all additional copies of the data.**

Upon the completion of data analyses and reporting, the sponsoring committee is responsible for coordinating with SIOP IT (inader@siop.org) to ensure transfer and archiving of data on a secure SIOP server. When providing the final, cleaned dataset,
the sponsoring committee should include both the data and the variable list with response options and codes provided, as well as a final copy of the survey (Word, PDF or other form is acceptable) and the text of the emails sent to members. Once the SIOP AO has confirmed that the files have been archived on the SIOP server, all local copies of the data set are deleted.
Archival Data Request and Approval Process

Step 1. Contact the SIOP committee that previously collected the data.

Individuals seeking access to archival SIOP survey data must first contact the SIOP committee originally responsible for collecting such data to explain the purposes of the request, ensure that the dataset can address the research questions posed, and secure the committee’s approval and assistance in coordinating efforts in obtaining and analyzing the data.

Step 2. Submit a request for archival data.

The IRC archival data request review process is initiated by both the individual requesting archival data and the chair of the committee that originally sponsored the survey. Such requests should be completed using the official archival data request form (see Appendix B) and submitted via email to IRC@siop.org. Each of the following should be described or included as part of the request:

- Research plan detailing the hypotheses, research questions and actual data requested to provide answers to such hypotheses and questions.
- An explanation of how the proposed research will benefit SIOP membership.
- Steps that will be taken to publish research results in a forum that benefits SIOP membership, and the expected time frame for such publication.
- A description of when results are expected to be analyzed and shared with SIOP members.
- A completed and signed SIOP Research Agreement – Use of Archival Data (see Appendix B).

Step 2: IRC reviews request.

The IRC will then review and respond to the archival data request within one month of receipt of all materials. Throughout the review process and upon IRC response, the individuals requesting data and the sponsoring committee chair should address any
questions or concerns received from the IRC in a timely manner.

**Step 3: If approved, IRC provides record of approval to relevant parties.**

Upon approval, the IRC communicates such approval to the individuals requesting archival data, the sponsoring committee chair, and the SIOP AO. If the archival data request is not approved, the IRC will notify both the requesting individual(s) and the sponsoring committee, who may then revise and resubmit the proposal.

**Step 4: Analyze and report results.**

The requesting individual(s) in coordination with the sponsoring committee then conducts analyses and publishes/communicates results to SIOP members through the SIOP communication vehicle outlined in the initial request.

**Step 5: Archive survey data and delete all additional copies of the data.**

Upon the completion of data analyses and reporting, the requesting individual and the sponsoring committee are responsible for coordinating with the SIOP AO (lnader@siop.org) to ensure transfer and archiving of data on a secure SIOP server in cases where the data file for the research includes additional data that were not in the original file received from SIOP. Note, additional variables summarizing the same data do not need to be included. In such cases, the archived data file should include both the data and the variable list with response options and codes provided, supplemented with a description of the additional data and how it was obtained and summarized. Once the SIOP AO has confirmed that the files have been archived on the SIOP server, all local copies of the data set are deleted.
Appendix A. SIOP Research Agreement.

[Editable version of this form available here]

SIOP agrees to provide data to [Researcher names] for the purpose of addressing the research hypotheses in the proposal titled [research proposal] subject to the following restrictions:

- Researchers will at all times follow APA guidelines regarding the use and safeguarding of data. Researchers are responsible for meeting the requirements of their organizations including but not limited to Institutional Review Boards, Research Committees, etc.
- Data provided by SIOP are to be used solely to address the specific hypotheses in the research proposal and following the methodology and analytical plan proposed. Any change to the hypotheses, methods, and analytical approaches requires submission of a new research plan and approval by the IRC.
- SIOP data are not to be transferred to any other entity or individual with one exception. Primary researchers may allow research assistants (e.g. undergraduate or graduate students) access to the data on an as-required basis solely for the purpose of assisting in the research.
- SIOP data will be held securely (e.g., on a password protected computer). In no circumstance will SIOP transfer personally identifiable data outside the Society.
- Researchers will publish the results of the proposed research in a suitable format. At a minimum this involves posting on the SIOP webpage by providing a brief write-up of the results to the SIOP Administrative Office. Researchers are also encouraged to employ other SIOP communication channel avenues (e.g., The Industrial-Organizational Psychologist (TIP), SIOP’s annual conference).
- All SIOP data remain the property of SIOP and must be deleted at the conclusion of the research project following confirmation of data archive on the SIOP server. Researchers are permitted to archive their notes, the results of statistical analyses and other products of their work. Requests for replication must come to SIOP.
Researchers agree to produce results within one year of receipt of the data. SIOP reserves the right to rescind this agreement if researchers cannot produce the research within one year of data receipt.

By signing below, the Researchers agree to the restrictions and principles of the Research Agreement and the general guidelines outlined in the SIOP Research Guidelines and Policies for Member Surveys document.

<table>
<thead>
<tr>
<th>Sponsoring Committee Chair</th>
<th>Researcher</th>
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Appendix B. Survey and Archival Data Request Forms

[Editable version of these forms available here]
SIOP Survey Request Form

Name: ____________________________ | Sponsoring Committee: ____________________________

Project Title: ____________________________

Requested Survey Launch Date: ____________________________

List any collaborating institutions and the nature of their collaboration: ____________________________

Targeted participants for the survey: ____________________________

Method of survey administration: ____________________________

Describe how the survey contributes to the stated goals of the sponsoring committee, SIOP’s strategic goals, and how it will benefit SIOP members: ____________________________

Forum(s) on which you plan to communicate results: ____________________________

Link to the survey: ____________________________

Attachments:

- Your research plan and timeline. Be sure to include your hypotheses, methodology, and analytic plan.
- Word document containing all survey items, instructions and explanation of any branching, routing, or dynamic text.
- Survey invitation and reminder emails.
- Proof of IRB exemption or approval.
- Research agreement.

Note: Completion of all fields are required. If you have a question regarding completion of this form, please see SIOP’s Research Guidelines and Policies for Member Surveys or contact SIOP’S Institutional Research Committee via email at IRC@siop.org.

By signing and submitting this request, you agree to follow the terms contained in the SIOP’s Guidelines and Policies for Member Surveys and SIOP’s research agreement.

Signature: ____________________________
**SIOP Archival Data Request Form**

**Name:**

**Sponsoring Committee:**

**Project Title:**

**Requested Dataset or Subset of Data:**

**Purpose of Research Project:**

**Any Special Requests Regarding Data Manipulation:**

**List any collaborating institutions and the nature of their collaboration:**

Describe how the survey contributes to the stated goals of the sponsoring committee, SIOP’s strategic goals, and how it will benefit SIOP members.

**Forum(s) on which you plan to communicate results:**

**Attachments:**

- Description of methodology and analytic plan.
- Research Agreement.

Note: Completion of all fields are required. If you have a question regarding completion of this form, please see SIOP’s Guidelines and Policies for Member Surveys or contact SIOP’S Institutional Research Committee via email at IRC@siop.org.

By signing and submitting this request, you agree to follow the terms contained in the SIOP’S Guidelines and Policies for Member Surveys and SIOP’s research agreement.

**Signature:** _______________________________________________