Survey Administration Planning Template

Planning a student perception survey is a complex process that involves many interconnected decisions. The timeline below outlines the recommended steps for survey administration planning. The questions following the template will help your district's planning committee walk through all of the necessary decisions in the initial planning phase. This template is intended to be used with the Student Perception Survey Planning Guide to provide full context on each step of the process.

Category	Person Responsible	Task
At Least 3 Months Before Administration		
Planning	Superintendent	• Appoint a district survey coordinator and create a district planning committee.
Planning	Planning committee	Make key decisions: • Use a vendor or manage administration internally? • Online or paper/pencil survey administration? • When will the survey be administered? • How will students and teachers be sampled? • Include an open-ended question on the survey? • How will survey results be used?
Planning	Planning committee	• Determine communication strategy for staff, students, and community.
Planning	District coordinator	• Start pulling needed student and teacher data for survey preparation.
2 Months Before Administration		
Planning	District coordinator	Start planning for survey administration with school leaders: • Appoint a building coordinator. • Inform all stakeholders of the purpose and process for the survey. • Verify the accuracy of student and teacher data. • Schedule the date(s) for survey administration. • Map the process for sharing survey reports with teachers.
Survey materials	District coordinator	• Customize building coordinator and proctor guides to reflect all key decisions.
Survey materials	District coordinator	• Start compiling materials such as surveys and building coordinator and proctor guides.
1 Month Before Administration		
Communication	Building coordinator	• Distribute protocols to all teaching staff and school administrators, even staff who are not serving as proctors.
Communication	District coordinator	• Let building coordinators know when their materials will arrive.
2 Weeks Before Administration		
Survey materials	District coordinator	• Deliver survey materials to schools.
Survey materials	Building coordinator	• Review survey materials. • Communicate with staff about the distribution of materials. • Remind staff to review the proctor protocols before administration.

Action Step	Considerations	Decision

Appoint a district survey coordinator.	• A trusted colleague who can build goodwill, with:
	  ○ Access to all principals and schools in the district
	  ○ Knowledge of district data systems and processes
		• District survey coordinator:
		
		_____

Create a district planning committee.	• A variety of people to build transparency and create strong communication throughout your district • People who will share the reasoning behind key decisions with a broad audience of stakeholders	• Chairperson: District survey coordinator • District and building administrators: _____ _____ • Teachers, including teachers' association reps: _____ _____ • District data staff (e.g., IT, assessment/data office): _____
Key decision: Use a vendor or manage administration internally?	• Cost vs. internal capacity	• Vendors to explore: _____ _____ • Internal survey team: _____ _____ _____
Key decision: Online or paper/pencil survey administration?	• Technology • Scheduling • Data quality • Data entry • Timeline • Cost	Select one: • Online administration • Paper/pencil administration • Hybrid
Key decision: When will the survey be administered?	• Timeline for results (e.g., if teachers need results for midyear reviews or other goal-setting conversations) • Other testing windows (e.g., district/school, course, TCAP) • School holidays and breaks	• Administration window: _____

Action Step	Considerations	Decision

Key decision:
How will students and teachers be sampled?
	• Teacher inclusion (e.g., all teachers vs. core teachers only)
	• Student inclusion
	  o Ensure students aren't inadvertently excluded or "oversurveyed"
	  o Consider inclusion — and associated accommodations — for ELLs and students with disabilities
	• Sample size necessary for teachers to receive a report
		• Which teachers will participate?
		_____
		
		• How will students be sampled (e.g., random sampling v. sampling within class periods)?
		_____

Key decision: Include an open-ended question on the survey?	• Value of open-ended feedback to teachers • Capacity to clean open-ended data	Will an open-ended question be included? • No. • Yes. _____ will clean the data.

Key decision:
How will survey results be used?
	• Use of results
	  o "Hold-harmless" year
	  o Formative tool
	  o Part of the evaluation system
	• Process for sharing results and with whom
		• Who will see teacher-level results?
		• How will teachers use results to change practice?
		• Will results be included in the evaluation system?

Determine communication strategy for staff, students, and community.	• Communication of key decisions to stakeholders
	  o Who will communicate them?
	  o What else do stakeholders need to know?
		Complete the communications template on the next page.

Start pulling needed student and teacher data for survey preparation.	• Necessary data elements
	• Additional data to include for disaggregating results
		• Use the data quality checklist at the end of this guide to answer the following questions:
		  o What data do we have?
		  o Where is it housed?
		  o What additional data will we include?
		  o Who will compile the data?
		  o By when?

Student Perception Survey Communications Plan

	Target Audience			
	Principals	**Teachers**	**Students**	**Community Members**

KEY INFO	• When will survey administration happen?
	• Who will participate?
	• How will students be assigned to teachers?
	• How will surveys be administered?
	  ○ Paper/pencil or online
	  ○ Administration schedule
	  ○ Student accommodations
	• Who will proctor surveys?
	• When will results be distributed?
	• How will results be used?
		• When will survey administration happen?
		• Who will participate?
		• How will students be assigned to teachers?
		• How will surveys be administered?
		  ○ Paper/pencil or online
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			• How will surveys be administered?
			  ○ Paper/pencil or online
			  ○ Administration schedule
			• Who will proctor surveys?
			• How will results be used?
				• When will survey administration happen?
				• How will results be used?

GUIDING QUESTIONS	Why they should care about the SPS: Most important spokespeople for this group: Channels of communication to employ: Needed communication materials: * Upcoming opportunities to communicate: Timeline for communication:	Why they should care about the SPS: Most important spokespeople for this group: Channels of communication to employ: Needed communication materials: * Upcoming opportunities to communicate: Timeline for communication:	Why they should care about the SPS: Most important spokespeople for this group: Channels of communication to employ: Needed communication materials: * Upcoming opportunities to communicate: Timeline for communication:	Why they should care about the SPS: Most important spokespeople for this group: Channels of communication to employ: Needed communication materials: * Upcoming opportunities to communicate: Timeline for communication:

*See the SPS toolkit for communication templates and tools.

OVERALL RECOMMENDATIONS

- **Uniform Data:** Data should be uniform for schools across your district. It may be helpful to have a single individual acting as the "data contact" who will organize the data for the entire district to ensure that data is consistent across all schools.
- **Complete Data:** Certain data elements are imperative for accurate administration and reporting. If your district or school does not track one of these data elements, it may be helpful to assign that data element for the purpose of survey administration.
    - Educator identifier (EDID) numbers: If you do not collect Teacher EDID numbers, you could use district-level ID numbers instead.
    - State-assigned student identifier (SASID) numbers: If you do not collect SASID numbers, you could use district-level ID numbers instead.
    - Teacher, student, and course names.
    - Grade (all levels) and period (secondary only) information for every student.
- **Nonrelevant Data:** All data not relevant to the survey administration should be removed:
    - School staff who should not be assessed (e.g., administrative staff, librarians, counselors, homeroom teachers, advisory and career path teachers)
    - Teachers who opt out of the survey if that is a choice provided to them by the district
    - Student teachers
    - Students who do not attend school in person (e.g., take classes online only)
    - Records for other semesters, trimesters, or quarters
- **Unique Data Qualities:** The unique qualities of your schools must also be considered when planning survey administration, including block schedules, groups of students who do/don't have certain electives, etc.

ELEMENTARY DATA

- **Homeroom Teachers**
    - List homeroom teachers only once. Remove duplicates if they are listed multiple times for the different classes that they teach with the same group of students (e.g., 3rd grade math, 3rd grade science, 3rd grade social studies).
    - Indicate if homeroom teachers have students in multiple classrooms and/or grades.
    - Ensure that all students have a record for their homeroom teacher, unless students do not attend homeroom (e.g., students only participate in classes taught by specialists).
- **Specialist Teachers:** Ensure that all students have a record for every specialist that they see. For example, if all 5th graders take PE, then all students should be assigned to that teacher in the district data system.

SECONDARY DATA

- **Period Information**
    - Include easily interpretable period numbers in the file.
    - Ensure that the periods are not listed more than once for the same student (e.g., a student has period 1 two times with two different teachers).
        - If this occurs because different days have different schedules, an additional column could be added that indicates to which day each period belongs to (e.g., A or B days).
    - Remove periods that should not be included in the selection (e.g., lunch period, advisory period).

ADDITIONAL ITEMS TO DOUBLE-CHECK

- Ensure that teacher and student names are spelled exactly the same way throughout the data file.
- Ensure that teacher IDs are the same for a given teacher and that two teachers do not have the same ID.
- Ensure that student IDs are the same for a given student and that two students do not have the same ID.