



K-12 SURVEY STRATEGY TOOLKIT

Prepared by Hanover Research

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INTRODUCTION

Districts frequently administer surveys to gather stakeholder perceptions of needs, priorities, preferences, and information related to logistics and operations.¹ Additionally, districts often collect longitudinal survey data to monitor progress and assess growth on strategic plan indicators, program impact metrics, and other district initiatives. District leaders use the insights gleaned from survey data to inform decisions about resource allocation, curriculum, supports, professional development, and other areas of consequence for the school community.²

To obtain valid and reliable survey data that are generalizable to the broader population, leaders should: use instruments that reliably measure the survey topic and follow industry and research-based best practices; write unbiased questions at the appropriate level for stakeholders; and engage all stakeholders so that the resulting sample reflects the composition of the community.³ Additionally, for the survey data to be actionable, it needs to be collected and analyzed before important decision-making meetings and deadlines. The results should also be shared with the community in order to demonstrate the district's commitment to transparency and accountability.⁴

Since so much goes into the planning, implementation, analysis, and follow-up of a survey, district leaders should develop an annual survey strategy, which ensures that quality survey data are collected to address district needs and avoid survey fatigue of stakeholders.⁵

OVERVIEW

In this toolkit, Hanover Research (Hanover) seeks to support districts in designing an annual survey strategy that maximizes data quality and stakeholder engagement and improves the extent to which survey data is meaningful and actionable. To this end, the toolkit:

- ✓ Discusses the key considerations for [constructing a systemic survey strategy](#)—including selecting which surveys to administer and scheduling each administration—and provides tools to help district leaders do so;
- ✓ Describes the steps needed to effectively [distribute a survey](#) to reach the desired stakeholders and to ensure high rates of participation among the target respondent population; and
- ✓ Explores the value of and best practices for [sharing survey results](#) to promote transparency and trust with stakeholders.

AUDIENCE

This toolkit is intended to be used by district and school leaders who want to create a comprehensive and cohesive annual survey strategy and improve the overall quality and utility of the surveys administered by their organizations.

DEVELOPING A SURVEY STRATEGY

Selecting Surveys

Before an annualized survey strategy can be created and deployed, **district leaders first need to determine what information they want to gather throughout the school year.** This work is best done during the summer months when leaders have had time to reflect on the previous year but have not set a schedule for the next school year’s activities.⁶ Though planning cannot prepare leaders for everything, the more a district can pre-plan its needs for data collection, the better leaders will be able to accommodate any new and pressing survey needs.⁷

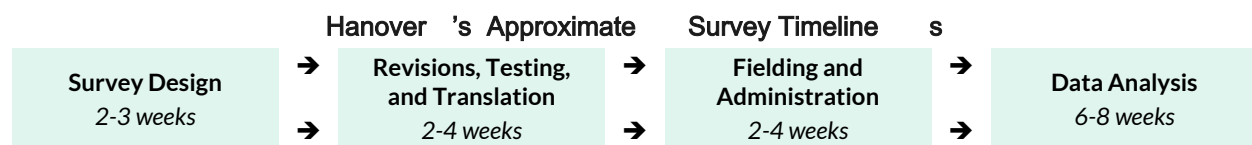
To understand and prioritize their data collection needs, district leaders should use the [Audit of District Survey Needs](#) (see p. 8). This tool allows district leaders to evaluate surveys administered in the past as well as what new surveys may be needed. Leaders can complete and discuss this form internally among staff or in consultation with a Hanover Director, who can assist in evaluating and prioritizing individual survey research projects.

Scheduling and Planning Surveys

Create a Calendar

Once district leaders prioritize survey needs, they should pre-plan for each survey administration. To do this, district leaders will need to identify district and school events, such as standardized assessment windows and extended school breaks, during which survey administration will yield low response rates.⁸ Surveys should be left open for two to four weeks in order to obtain the best response rate possible, and these windows should ideally be timed to align with staff development days and/or parent events at the schools, if possible.⁹ Doing so demonstrates to stakeholders that district leaders deem the survey important enough to dedicate time and resources to collect responses.¹⁰ Once the data is collected, sufficient time should be scheduled for analysis to ensure all research questions are answered before using the findings to inform decision-making and before sharing the findings with stakeholders.¹¹

Scheduling surveys should take into account the time required for each phase of the process, and district leaders should backwards plan from when they will need the final report. For example, the timeline below reflects Hanover’s survey timelines, and Hanover Directors can support leaders in creating an annual survey calendar within their custom research queues.



Source: Hanover Research

K-12 SURVEY STRATEGY TOOLKIT: DEVELOP A SURVEY STRATEGY

Planning Each Individual Survey

Districts should ensure that each survey effectively answers the district’s research questions. To this end, district leaders should discuss the needs of each survey before its distribution. To help with this, the district can use the [Planning a Survey Form](#) (see p. 9) to ensure all leaders understand the goals and purpose of each survey within the overall survey strategy.

After discussing the goals and purpose of a survey, leaders can choose to use a templated survey or custom survey. As part of a Hanover membership, district leaders have access to templated survey instruments designed by Hanover content experts and survey methodologists. District leaders can work with their Hanover Director to determine if a templated survey, described below, is the best approach to meet the district’s needs or if Hanover can instead design a custom survey to align with unique research questions and district needs.

Catalog of Templated Hanover Surveys

Survey Name and Target Audience	Research Questions	Constructs/Topics
<p>Social-Emotional Learning Survey</p> <p><i>Staff, parents, and Grades 6-12 students</i></p>	<ol style="list-style-type: none"> 1. To what extent are district students and staff self-aware; able to self-manage; socially aware; able to establish and maintain positive relationships; and able to make responsible and caring decisions? 2. How does the extent to which students and staff demonstrate the competencies above differ, if at all, by respondent characteristics, such as school, grade level, special program participation, and demographics? 3. To what extent are district staff and parents familiar with SEL competencies and their impact on student outcomes; confident in their/teachers’ ability to support student SEL; in support of prioritizing SEL competencies in district plans and initiatives; and satisfied with the SEL supports and resources available to them? 	<ul style="list-style-type: none"> • Self-awareness • Self-management • Social awareness • Relationship skills • Responsible decision-making • Familiarity with SEL competencies • SEL priorities • SEL instructional confidence • Classroom instruction • SEL outcomes • Support and training
<p>Climate Survey</p> <p><i>Staff, parents, Grades 6-12 students, and community members</i></p>	<ol style="list-style-type: none"> 1. What are stakeholders’ perceptions of current school and district climate? 2. Among the four key constructs, which are school/district strengths? Which are areas for further focus? 3. How do stakeholders’ perceptions of the school climate differ across stakeholder groups? Schools? 	<ul style="list-style-type: none"> • School/building environment • Academic environment • Social environment • Stakeholder inclusiveness

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Survey Name and Target Audience	Research Questions	Constructs/Topics
<p>Technology Survey</p> <p><i>Staff, parents, and Grades 6-12 students</i></p>	<ol style="list-style-type: none"> 1. What are stakeholder perceptions of the use, implementation, and impact of technology at district schools? 2. What supports and resources do stakeholders need to improve the use, implementation, and impact of technology? 	<ul style="list-style-type: none"> • Support for technology integration • Beliefs and concerns about technology integration • Technology efficacy • Technology use and impact • Access to technology at home • Technology-related professional development
<p>Professional Development (PD) Needs Assessment</p> <p><i>Staff</i></p>	<ol style="list-style-type: none"> 1. To what extent are staff engaged and connected to their school? 2. What are staff's current perceptions of self-efficacy? 3. How satisfied are staff with the PD they have taken recently at their school or district, in terms of both topics and format? 4. What are staff's preferences for PD in the future, in terms of topics, format, and timing? 	<ul style="list-style-type: none"> • Staff engagement and self-efficacy • PD participation • PD satisfaction • PD interests • PD format
<p>Summer Learning Program Survey</p> <p><i>Staff, parents, and Grades 6-12 students</i></p>	<ol style="list-style-type: none"> 1. To what extent are stakeholders satisfied with the summer learning program? 2. What are stakeholders' perceptions of the effectiveness of the summer learning program? 3. What are the barriers to enrolling in the summer learning program? 4. To what extent is the summer learning program implemented with fidelity? 5. How do perceptions differ across stakeholder groups? 	<ul style="list-style-type: none"> • Satisfaction • Effectiveness • Program barriers • Fidelity of implementation • Transportation
<p>Strategic Priorities Diagnostic Survey</p> <p><i>Cabinet members and staff</i></p>	<ol style="list-style-type: none"> 1. What strategic areas do cabinet members consider to be most important for the district? 2. What strategic areas do staff perceive as district strengths? 3. What strategic areas do staff perceive as areas for district improvement? 4. What strategic areas are considered both high priority by cabinet members and in need of improvement by staff? 	<ul style="list-style-type: none"> • District leadership • Teaching and learning • District culture • Resources and operations

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Survey Name and Target Audience	Research Questions	Constructs/Topics
<p style="text-align: center;">Equity and Inclusion Diagnostic Survey</p> <p style="text-align: center;"><i>Staff, parents, and Grades 6-12 students</i></p>	<ol style="list-style-type: none"> 1. What are stakeholders' perceptions of equity, inclusion, and diversity within the district? 2. What are differences in perceptions within the district across and within groups (e.g., between students and staff, among students from different racial/ethnic groups, etc.)? 3. What are stakeholders' priorities for equity, inclusion, and diversity? 	<ul style="list-style-type: none"> • Beliefs about equity • School environment • Academic environment • Social environment • Staff perceptions • Engagement and outreach • District DEI priorities
<p style="text-align: center;">Program Evaluation Diagnostic Survey</p> <p style="text-align: center;"><i>Staff</i></p>	<ol style="list-style-type: none"> 1. What do district and school staff already know and understand about program evaluation? 2. What are staff's priorities for program evaluation? 3. To what extent do staff have the internal capacity to conduct a program evaluation? 4. What do staff see as the desired outcomes of a program evaluation? 	<ul style="list-style-type: none"> • Defining program evaluation • Prioritizing evaluation • Logic models • Internal capacity • Desired outcomes
<p style="text-align: center;">Local Control and Accountability Plan (LCAP) Survey</p> <p style="text-align: center;"><i>Staff, parents, and Grades 6-12 students</i></p>	<ol style="list-style-type: none"> 1. What are stakeholders' perceptions of the current school climate in the district? 2. To what extent is the district successfully engaging its parent community? 3. What are stakeholders' perceptions of the districts' ability to provide quality services and programming? 4. To what extent is the district improving its services and programming for the student subgroups that are identified in the LCAP? 5. How do these perceptions differ across stakeholder groups? 	<ul style="list-style-type: none"> • Student engagement • School and district climate • Support for sub-populations • Parent engagement • Staff climate • Overall satisfaction

Source: Hanover Research



Audit of District Survey Needs

Directions: Answer the questions below to determine the kinds of data you seek to gather and examine via the surveys and to identify whether you currently administer a survey that supports such data collection and analysis. For those items for which no annual survey currently exists, please use the [Planning a Survey Form](#) beginning on p. 9.

QUESTION	AREA 1	AREA 2	AREA 3
In what areas are we currently required to collect survey data due to federal, state, or local mandates? In what non-mandatory areas do we wish to collect survey data?			
Do we currently administer a survey to collect data related to this area? If so, which survey? <i>If a survey is already administered in the area, please continue to answer the questions below. If a survey is not yet administered, please use the Planning a Survey form to begin planning for a corresponding survey.</i>			
When is this survey typically administered?			
Which stakeholder groups are typically asked to respond to this survey?			
How do we currently use the data generated from this survey?			
How do we typically communicate the results of the survey to our district or school community?			

Source: Hanover Research



Planning a Survey

Directions: As a leadership team, answer the following questions for each survey you want to administer. Use this form to ensure surveys meet the specific needs of the district before they are administered.

<i>Project Details</i>	
<i>Purpose</i>	
Central question(s) we need to answer	
What will we do with the results?	
When do we need the results by?	
<i>Sample Development</i>	
Which population(s) will we survey?	
Specific screener/disqualifying questions?	
<i>Administration</i>	
How will we distribute the survey?	

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Project Details	
Will the survey be offered in multiple languages? <i>If so, which language(s)?</i>	
Are we offering an incentive? <i>If so, what is it?</i>	
Content	
Are there specific questions we know we want to ask?	
Are there specific sections we need to include?	
Is there a need for any open-ended questions? <i>If so, what are they?</i>	
Planning for the Analysis	
For what subgroups do we expect differences in perceptions?	
What level of detail is needed for the analysis (e.g., a short written executive summary or detailed data files and charts)?	
What analysis format would be most helpful for the team using the results (e.g., presentation-style report, a dynamic dashboard)?	




Source: Institutional Research¹², Hanover Research¹³

DISTRIBUTING SURVEYS TO STAKEHOLDERS

Outreach Strategies

Though the development of a valid and reliable survey is imperative to collecting quality data, district leaders must also dedicate planning time to **outreach strategies to maximize response rates**.¹⁴ To maximize the reach of a survey, district leaders need to tailor outreach efforts to the desired audience. Examples of outreach strategies for different stakeholder groups are described below. The district should also use the [Survey Outreach Planning Form](#) (see p. 12) to clearly identify the survey’s intended audience, the district’s plan for outreach, and the staff member(s) responsible for conducting outreach.

Outreach Strategies by Stakeholder Group

Group	Suggested Strategies
 Students	<ul style="list-style-type: none"> Designate time during school (e.g., homeroom, all English language arts classes) Hang signs about the survey in high traffic area Talk about the survey during the daily announcements Announce the survey on the district/school webpage Send email to student schools accounts Offer the survey in multiple languages Ask principals to consider incentives if more than a certain percentage of students complete the survey
 Teachers and Staff	<ul style="list-style-type: none"> Have principals send an email to their staff communicating the importance of the survey and requesting their participation Have principals to set aside time in staff meetings to complete the survey Send response updates to principals with the number of staff members from each school who have completed the survey to encourage friendly competition among schools Ask principals to consider incentives such as free food at a staff meeting if more than a certain percentage of staff complete the survey
 Parents and Families	<ul style="list-style-type: none"> Offer the survey in multiple languages Advertise the survey through existing communication channels, such as school/district websites, parent newsletters, social media, and principal communications Partner with local organizations to advertise the survey Mail a letter to parents communicating the importance of the survey and requesting their participation Include a QR code for respondents to access the survey through their smartphones Coordinate survey administration with events that bring parents into school, such as parent-teacher conferences

Source: Hanover Research¹⁵

Leveraging Reminders

Once the survey is distributed, the **district needs to provide stakeholders with reminders about the survey**.¹⁶ Studies suggest that daily reminders are not effective in improving response rates; rather, leaders should give stakeholders at least two days and up to a full week—depending on the length of the survey window—to complete the survey before sending the first reminder.¹⁷ In addition, leaders should limit the number of reminders to four, as more reminders result in diminishing returns.¹⁸ Notably, keeping the tone and language of reminders light and even humorous has been found to increase the overall response rate as compared to reminders that are more formal in tone.¹⁹



Survey Outreach Planning

Directions: Complete this form prior to each survey you plan to administer.

Survey Name:	
<p>What stakeholders will receive this survey?</p>	
<p>How will we tell each group about the survey? Who is responsible for the individual outreach methods?</p>	
<p>By what date will each instance of outreach be completed?</p>	
<p>When will we follow up with those who did not take the survey? Who is responsible for sending reminders?</p>	

Source: Hanover Research

SHARING AND USING SURVEY DATA

Publicizing Survey Data

Survey results should be shared with stakeholders to gather their comments and reflections.²⁰ **Sharing results with stakeholders builds trust**, as it shows the district is willing to be transparent and be held accountable for its actions.²¹ District leaders should not just focus on sharing results with adult stakeholders; students need to be included as well. Presenting data collected from students with students allows them to see analysis modeled and gives them a chance to learn from real-world examples.²² In addition, presenting data to students shows them that the district values their input, increasing the likelihood of future student participation in district surveys.²³

It is important to also consider the needs and preferences of each audience when sharing survey results.²⁴ Leaders should carefully consider which data should be shared and what stakeholders should learn from this information.²⁵ Though not exhaustive, the list below identifies different ways of presenting survey results to stakeholders, and the [Data Presentation Form](#) (see p. 14) will help leaders understand who needs to see data, what data they need to see, how the data will be presented, and who is responsible for stakeholder communication.

Options for Presenting Survey Results

PRESENTATION TYPE	PRESENTATION OPTIONS	
Interactive	<ul style="list-style-type: none"> ○ Presentations ○ PowerPoint ○ Flip charts 	<ul style="list-style-type: none"> ○ Podcasts ○ Videos
Written	<ul style="list-style-type: none"> ○ Summary reports ○ Blogs 	<ul style="list-style-type: none"> ○ Newsletters ○ Emails
Visual	<ul style="list-style-type: none"> ○ Data Dashboards 	<ul style="list-style-type: none"> ○ Posters

Source: Inspiring Impact²⁶

Using Survey Data

Survey results should be used to celebrate areas of strength and excellence as well as to identify and plan for necessary improvements.²⁷ Involving stakeholders in this process not only reinforces the idea that the district leaders are transparent and willing to be held accountable, but it also gives stakeholders a chance to be active in implementing changes, which cultivates buy-in.²⁸

Once actions are identified to address areas of need identified in the survey, district leaders will need to engage in progress monitoring and longitudinal data collection.²⁹ The [Data Action Plan Form](#) (see p. 15) provides high-level questions for consideration in developing a progress monitoring plan. Districts should plan to readminister the survey as a key step in understanding the impact of actions taken resulting from baseline survey data.



Data Presentation

Directions: Complete this form prior to each survey you plan to administer.

Survey Name	
To what groups are we presenting this data?	
What information is most important for each group to see?	
How will we present the data to each group?	
When will the data be presented to each group?	
Who is responsible for the presentation of data for each group?	
How will we collect feedback from each group?	

Source: Hanover Research



Data Action Plan

Directions: Complete this form prior to each survey you plan to administer.

Survey Name	
What feedback did we get from stakeholders?	
What goals can we set based on this data?	
What actions will we take to address this feedback and reach our goals?	
What is our timeline to reach these goals?	
When will we readminister the survey to monitor our progress toward these goals?	
How will we hold people accountable?	

Source: Hanover Research

ENDNOTES

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ABOUT HANOVER RESEARCH

Hanover Research provides high-quality, custom research and analytics through a cost-effective model that helps clients make informed decisions, identify and seize opportunities, and heighten their effectiveness

OUR SOLUTIONS

ACADEMIC SOLUTIONS

- **College & Career Readiness:**
Support on-time student graduation and prepare all students for post-secondary education and careers.
- **Program Evaluation:**
Measure program impact to support informed, evidence-based investments in resources that maximize student outcomes and manage costs.
- **Safe & Supportive Environments:**
Create an environment that supports the academic, cultural, and social-emotional needs of students, parents, and staff through a comprehensive annual assessment of climate and culture.

ADMINISTRATIVE SOLUTIONS

- **Family and Community Engagement:**
Expand and strengthen family and community relationships and identify community partnerships that support student success.
- **Talent Recruitment, Retention & Development:**
Attract and retain the best staff through an enhanced understanding of the teacher experience and staff professional development needs.
- **Operations Improvement:**
Proactively address changes in demographics, enrollment levels, and community expectations in your budgeting decisions.

LEADERSHIP SOLUTION

Build a high-performing administration that is the first choice for students, parents, and staff.

OUR BENEFITS



EXPERT

200+ analysts with multiple methodology research expertise



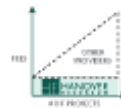
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DEDICATED

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