



SDP External Survey Best Practices Checklist

Are you considering surveying students or others in schools? The purpose of this checklist is to provide guidance to external researchers who are creating surveys to collect stakeholder feedback with Research Review Committee approval for research purposes (e.g. academic studies, program evaluation, progress monitoring, grant-mandated reporting). The following is only a guide; adhering to these practices does not guarantee approval of the submitted proposal.

NOTE: Surveys may not be administered to staff or students by external researchers (including SDP employees working on their masters or doctoral theses) without RRC approval. Please see [here](#) for additional information on submitting a proposal to conduct research in the School District of Philadelphia.

Table of Contents

Deciding whether to conduct a survey	1
Participant selection	2
Writing survey questions	2
Informed consent, data protection, and confidentiality	4
Survey administration	5
For more information	6

Deciding whether to conduct a survey

A survey is an appropriate tool when:

- You need to gather feedback from a large, representative sample of people.
- You need to compare perceptions/experiences between two or more groups of stakeholders.
- You need to evaluate or measure attitudes/experiences with a specific program, intervention, etc.
- You have well-defined questions (and response options) in mind.
- You have a clear and feasible plan for how the results of the survey will be used.

Consider other methods of gathering feedback in the following cases:

- If feedback from a few people could answer your questions, consider conducting interviews or focus groups to avoid overburdening large numbers of stakeholders.
- If relevant information has already been gathered in existing data. Check the SDP [Open Data website](#), [School Profiles](#), [District-Wide Survey Dashboard](#), and websites of relevant program offices for publicly available data.
- If a topic or research question is complex, nuanced, or relatively little is known about it, then interviews, focus groups with key stakeholders, and/or direct observations may provide better and more in-depth information. Qualitative research can be a great starting point for *future* surveys or quantitative research.
- If you do not have a clear and feasible plan for how the results of the survey will be used.

Participant selection

TO DO	Additional information
<input type="checkbox"/> Consider which stakeholder groups will provide the best information about the topic you are researching.	Students, families, and staff receive a very large number of surveys each year. Think about which stakeholders might have the best information about your topic of interest, and <i>only</i> survey the respondent groups you <i>really</i> need to hear from.
<input type="checkbox"/> Think about how many respondents/schools you need to survey to answer your research questions, and select your sample accordingly.	Only survey as many respondents as you need. If you only need a general sense of how stakeholders across the District feel, would selecting a representative sample of schools be more efficient? If you need results by school, could you narrow the sample to a subset of classrooms or grade levels, or randomly pick 10% of respondents from each school to receive the survey? See here for more on the advantages and disadvantages of different sampling approaches.

Writing survey questions

TO DO	Additional information
<input type="checkbox"/> Make sure the survey has a clear introduction and guidance around questions where needed.	<ul style="list-style-type: none"> • Provide clear instructions at the beginning of the survey. • For longer surveys, include brief descriptions to introduce each new section. • Think about the language you are using for the items and the population • Define any terms your audience may be unfamiliar with.
<input type="checkbox"/> Determine if there is a need for collecting identifying information, such as participants' names or IDs.	Avoid collecting names, IDs, or other identifying information if you don't need them. You may need them if: <ul style="list-style-type: none"> • You need to link participants' responses with other information about them. • You need to track how individuals' responses change over time. • If you plan to survey students, please review SDP's Student Survey policy for protecting personally identifying information.
<input type="checkbox"/> Determine if there is a need for collecting demographic data.	<ul style="list-style-type: none"> • Collecting information about participant background, such as: gender, race/ethnicity, school, ZIP code, and grade level will allow you to compare responses for different groups of participants.

Writing survey questions

	<ul style="list-style-type: none"> ● Collecting demographic/background information will also allow you to check whether the profile of people who take the survey is representative of the school/District. ● Be aware that demographic information could make results identifiable. ● If you plan to survey students, please review SDP's Student Survey policy for protecting personally identifying information.
<input type="checkbox"/> Determine the question order.	<ul style="list-style-type: none"> ● Begin the survey with required questions, in case respondents do not finish the survey. ● Begin the survey with straightforward questions. ● Ask less sensitive questions first. ● Move from general to more particular questions. ● If your survey requires skip logic, plan the question order carefully, and ensure the logic works correctly.
<input type="checkbox"/> Survey questions should be clear and concise.	<ul style="list-style-type: none"> ● Simplify survey language to a 3rd grade reading level for students and a 6th grade reading level for parents. ● Avoid questions that are long, complicated, or that ask more than one thing (e.g., avoid asking “How much do you like your teacher and classmates?” Instead, break into two separate questions). ● Avoid ranked choice questions (e.g., “Rank the following things in order of what you like most about school to what you like least”) because they are difficult to answer and results are difficult to interpret. ● Check that questions are not leading/biased (e.g. “How much do you love the program you participated in?”). ● Choose Likert scales (e.g., “How much do you agree with...”) and response options (e.g., “Strongly, Disagree, Disagree, Agree, Strongly Agree”) that make sense for the questions being asked.
<input type="checkbox"/> Is the length of the survey appropriate for your intended respondent group?	<ul style="list-style-type: none"> ● Try to have a survey that can be answered in 12 minutes or less; a shorter survey is less burdensome on your participants. ● Have a plan for how you will use each question's results – avoid including questions simply because they would be “nice to have.” ● Identify non-essential questions that could potentially be dropped from the final version of the survey.

Writing survey questions

<input type="checkbox"/> Do not include open-ended questions (that allow longer responses) unless there is a feasible plan for how to analyze the responses.	<ul style="list-style-type: none"> • Open-ended responses can be helpful when feedback is needed that does not fit neatly into predetermined answer choices, or when you want a participant to expand on an answer. However, it can be time-consuming to analyze and draw valid conclusions from open-ended feedback, especially if there are a high number of responses.
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Informed consent, data protection, and confidentiality

TO DO	Additional information
<input type="checkbox"/> Start by describing the purpose of the survey.	<ul style="list-style-type: none"> • Use clear, simple language so participants can quickly understand the purpose of the survey. • Describe how results will be used (e.g., to allocate resources, to assess the impact of a program and decide if it should be continued, etc.).
<input type="checkbox"/> Make sure participants are aware of what it will be like to take the survey, and any potential risks or benefits of participating.	<p>Information should include:</p> <ul style="list-style-type: none"> • The amount of time and effort needed to take the survey, trying to keep it to 12 minutes or less. • The topics covered in the survey, including any sensitive topics. • Any potential risks and benefits for those who participate in the survey. • Describe, if applicable, the method and timeline for distributing incentives such as a gift card or raffle.
<input type="checkbox"/> Clearly state that the survey is optional and that participants can skip any questions and stop at any time.	<ul style="list-style-type: none"> • Example text might be, "It's okay to skip some questions or to answer that you are not sure."
<input type="checkbox"/> Confirm that you have both student assent and active parent consent.	<ul style="list-style-type: none"> • Active parent consent and student assent is required for most work being conducted by an external researcher.
<input type="checkbox"/> Include a confidentiality statement and, if applicable, the methods of how their identifying information will be protected.	<ul style="list-style-type: none"> • Example text might be, "Your honest feedback is very valuable to us and will help us understand how we can support you. What you say on the survey is confidential and will be kept private."
<input type="checkbox"/> Make sure that the language used to describe the purpose of the survey, risks/benefits, is accessible for everyone.	<ul style="list-style-type: none"> • Is the language at a 3rd grade reading level for students and 6th grade reading level for parents?

Informed consent, data protection, and confidentiality

<input type="checkbox"/> Store survey response data in a safe place.	<ul style="list-style-type: none"> • If the survey is a Google form, or if responses are saved in a Google folder, make sure folder sharing permissions are restricted only to staff who will be analyzing the data. • If the survey is conducted on paper, ensure that you keep survey responses in a locked drawer or cabinet, and shred paper responses after three years.
<input type="checkbox"/> Do not share any results/responses that could identify individual respondents.	<ul style="list-style-type: none"> • Share survey results in the aggregate (e.g., a summary of responses from a given school). • If you decide to share quotes from open-ended responses, make sure to redact or change any information that could identify the respondent (e.g., names of people or schools).
<input type="checkbox"/> Share the results of the survey with the relevant audience.	<ul style="list-style-type: none"> • Research findings should be shared with the Research Review Committee and relevant program office. • Thank participants for taking the survey.

Survey administration

TO DO	Additional information
<input type="checkbox"/> Decide how you will collect data (online or on paper).	<ul style="list-style-type: none"> • If creating an online survey, ensure that there are no restrictions or required payments to use an online survey platform (Google forms, Qualtrics, SurveyMonkey, etc.).
<input type="checkbox"/> Have a few people test the survey to make sure it works (links, skip logic, etc.) and that there are no errors in survey questions.	<ul style="list-style-type: none"> • Testing the survey first helps avoid errors or problems when the survey is launched.
<input type="checkbox"/> If it is a new survey, or if you are surveying students or a population you do not survey frequently, test the survey out with a few people who are similar to your target population.	<p>Helpful testers may include:</p> <ul style="list-style-type: none"> • People who are the same age or background as your participants. • Colleagues who have taught/worked in schools in the past.
<input type="checkbox"/> Translate the survey into the languages spoken by participants.	<ul style="list-style-type: none"> • Make plans to translate any open-ended responses after the survey closes.

For more information

- [The School District of Philadelphia Policy on Student Surveys](#)
- [Writing Survey Questions](#)
- [Surveys 101: Design surveys, collect responses, and analyze the data like a pro.](#)
- [Best Practices for Survey Research](#)
- [How to create an effective survey in 15 simple tips](#)

Please send questions to researchreview@philasd.org.