

Guide for Developing a Survey

Developing a survey for your teachers, students, or entire school can feel like a daunting task. It can be difficult to know where to begin or how to put together all your ideas to create a survey that gathers all the information you need. To help, we developed the following tool to walk you through, step by step, on how to facilitate the process of developing a survey.

Please navigate to the following link to access a sample companion tool to walk you through the process. <https://cms.childtrends.org/wp-content/uploads/2025/07/Process-for-Developing-a-Survey-Instrument.xlsx>

Step 1: Compile the questions. In the first step of the process, you and your team will narrow down the types of questions you would like to ask. You can start by identifying the themes you would like your questions to cover. Once you've identified 3-4 themes, you can insert them in your own copy of the Excel sheet like the one shared above. See whether any survey questions your team has used in the past might fit within those themes, search on Google Scholar for surveys that may be applicable to the themes, or search the internet more broadly. If you have the time and capacity, you and your team can also adapt or create some questions of your own. Ensure that you track the sources of your items to give credit where due.

Step 2: Narrow down and select the questions. The second step focuses on narrowing down the questions you'll include in the final, distributed survey. As in our sample companion tool, you will highlight questions in respective colors to determine whether you want to include them in the survey, whether you are unsure, or whether you plan to discard them: Highlight items to include in **green**, items with uncertain status in **yellow**, and items to exclude in **red**. Complete this exercise with all the items on your list.

Step 3: Compile final questions. Before compiling your final list of survey questions, determine *how many* questions you want to include. Once you have established a number, copy and paste all questions highlighted in green into your final survey tab (as in the companion tool). If the number of green questions is smaller than your target number, feel free to copy the yellow questions, too. If the number of green questions is larger than your target number, discuss with your team which questions are more important or better cover your goals for the survey.

Step 4: Finalize the survey. In the final survey tab, include scale type, number of response options, response scale, themes, notes, and the source from which the item was derived. Once you have completed all this information, you can program your survey into the platform you will use to distribute it. Then, you're ready to launch your survey and gather the data you need to keep learning about your school system!