

Intentional Engagement: How to Create and Administer a Community Survey in the Charter Sector

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What Is a Community Survey, and Why Administer One?

Community surveys serve as valuable tools for gathering insights into the interests, needs, and aspirations of communities in certain geographic areas, or for specific populations. By utilizing these surveys, educational institutions can ensure that schools, programs, and services align with community assets and effectively fulfill their needs. Various entities¹ such as charter authorizers, district offices, and charter management organizations can employ these surveys for the future and make decisions that resonate with community interests.

Furthermore, community surveys, in contrast to focus groups or interviews, facilitate the collection of data from a more extensive pool of respondents. This wealth of data can then be disaggregated based on various characteristics, enabling a more thorough examination of the viewpoints held by different demographic groups.

¹ In this resource, we will refer to “charter entities” to mean charter authorizers, charter developers, charter management organizations, and CSP state entity grantees.

Table 1 outlines reasons a variety of charter entities might choose to administer a community survey.

Table 1. Why Administer a Community Survey?

Charter entity	Reasons to administer a community survey
Developers	<ul style="list-style-type: none">• Determine desired and needed educational programs and services• Inform decisions about expansion and replication
Charter management organizations	<ul style="list-style-type: none">• Determine desired and needed educational programs and services• Inform decisions about expansion and replication• Inform decisions about locating in new communities
Charter authorizers	<ul style="list-style-type: none">• Inform authorization decisions for new schools, school expansion, and replication• Provide information about the types of programming and new school models that are needed
Charter School Programs State Entity grantees	<ul style="list-style-type: none">• Provide information about the types of new school models that are needed and where replication and expansion are warranted

Why Community Surveys Are Important Now

The growth of the charter sector has slowed since the 2015–16 school year, although there was a notable uptick between 2018–19 and 2020–21.ⁱ Conversely, overall enrollment in traditional public schools has been on a decline since 2020.ⁱⁱ In addition, in certain communities, there has been an increase in political opposition to charter schools, making the process of authorizing new schools more challenging. Given these circumstances, it becomes crucial for new school applicants to demonstrate a viable plan to achieve sufficient enrollment upon opening. Moreover, existing schools need to consistently meet their projected enrollment numbers.

A key strategy in ensuring sustained enrollment is aligning schools closely with the assets and needs of the communities they serve. By doing so, schools can establish a stronger connection with community members, making it more likely that they will attract and sustain students and families. This community-centric approach not only supports schools in creating financial stability but also fosters a positive relationship between the school and the community, which is vital for long-term success.

This brief is a resource designed to assist charter entities, including both authorizers and schools, in gathering actionable insights about their communities by using surveys. These entities can and should leverage the survey results to ensure that schools not only are authorized but also operate in a manner that effectively aligns with the desires and aspirations of communities they are meant to serve.

Furthermore, this resource can be utilized in conjunction with two other valuable resources on community engagement, catering to the needs of both charter operators and authorizers.

- [Assessing Community Needs: Strategies for Charter Schools and Authorizers](#). This resource outlines promising practices and suggested steps for assessing community needs using a variety of data collection strategies.
- [Engaging Stakeholders Through Authentic Community Meetings](#). This resource shares ideas for how authorizers can plan inclusive community meetings that capture authentic community input.

Community surveys can be leveraged as a partial means to fulfill the criteria outlined by the U.S. Department of Education’s Charter School Programs (CSP) Grant. This includes the necessity of conducting a needs analysis aimed at evaluating how new schools “would serve the interests and meet the needs of students and families in the communities the charter school intends to serve.”²

Figure 1. Steps for Survey Planning



² Application for New Awards; Expanding Opportunity Through Quality Charter School Programs (CSP)— Grants to State Entities (State Entity), <https://www.federalregister.gov/documents/2023/03/20/2023-05612/application-for-new-awards-expanding-opportunity-through-quality-charter-schools-program-csp-grants>.

Where to Start

Determining the purpose of your survey upfront is crucial to ensuring it effectively aligns with your goals. Are you an authorizer looking to understand what kinds of school models community members are seeking, or are you a Charter Management Organization (CMO) considering expansion into a specific neighborhood? The survey's scope should naturally stem from this primary purpose.

Determine Your Purpose and Scope

For instance, creating a survey to understand community preferences regarding school models involves asking questions about existing access to educational programs as well as educational needs, values, and interests. The following are potential topics for a community survey:

- **Instructional Models and Approaches.** This aspect involves inquiring about the instructional models that resonate with community members. Questions could address whether they favor bilingual programs, STEM-focused curricula, or perhaps Montessori approaches.
- **Academic Supports.** When considering academic support, it is important to ask respondents about the types of assistance they believe are vital for students to succeed in school. This might encompass strategies such as tutoring, small group instruction, or online intervention programs.
- **Extracurricular Options.** To capture the community's desires regarding extracurricular activities, one should inquire about their preferences. This can include exploring the kinds of sports programs they are interested in and whether they are seeking specific arts-related offerings to enrich their children's education.

Define the Community You Intend to Survey

Once the purpose and scope of the survey are clear, charter entities should proceed to define the specific community they intend to survey as their target audience. This definition of the community will naturally vary depending on the survey's objectives.

For instance, if a CMO is deciding whether to expand into a particular neighborhood, the organization would likely prefer to survey parents within a reasonable commuting distance from a potential new school site. In this scenario, the community may be defined as a specific geographical region, focusing on those who would be most likely to enroll.

Conversely, an authorizer might choose to define the community they are surveying as a subpopulation, such as high school families, when they are trying to determine the secondary education preferences within that community.

In many cases, the community definition should encompass various interested groups, such as current and prospective students and their families, local residents, community-based organizations, school staff and educators, school leadership, and board members.

Assemble a Team

Once you have determined the community you will survey, assemble a team to design and administer the tool. This team should consist of individuals from your organization as well as any necessary partners or consultants to facilitate the survey process effectively.

In forming your team, it is vital to include individuals who share the backgrounds or experiences of the community members you intend to survey. This diversity within the team enhances your ability to communicate with interested parties in a relatable and culturally sensitive manner.

Some charter entities may have limited capacity to independently administer a community survey. In such cases, a collaborative approach can be adopted. The charter entity could outline the survey plan and then collaborate with a community partner, a parent organization, or multiple partners to execute the survey. Alternatively, they might choose to build upon existing survey initiatives led by other organizations.

Another viable option for charter entities with limited resources is to enlist the services of a consultant specializing in survey design, administration, and data analysis. Hiring a consultant can ensure the survey is conducted professionally and yields meaningful, unbiased results. This approach allows charter entities to leverage external expertise while focusing their internal resources on using the survey data to inform their initiatives effectively.ⁱⁱⁱ

Identifying the right partners can add to an organization's capacity to administer community surveys and analyze the results.

“The right partners” are typically those with established, close-knit connections within the community and a deep understanding of its needs.

For example, a community-based organization may already possess strong ties with the families residing in an authorizer's or school's community, making them more effective in encouraging survey participation. Early engagement with a partner during the planning phase can facilitate

seamless implementation. In addition, it is worth contemplating the formation of an advisory committee that encompasses representatives from the very groups you intend to gather input from. Such a committee can play a pivotal role in assisting charter entities in engaging a diverse group of community members throughout the survey plan development, outreach efforts, and data collection. Importantly, this approach ensures cultural responsiveness and inclusivity, guaranteeing that all voices are not only heard but also considered. Furthermore, committee members can offer valuable insights and context for subsequent data analysis.^{iv}

Ideas for Who to Include on Your Team

- School leader or authorizer leaders
- Board members (district or charter)
- Community-based organizations staff
- Parent/family representation
- Student representation

Plan Your Survey

Most charter entities will opt for an online survey format given its ease, efficiency, and cost-effectiveness. However, there are situations in which a paper-and-pencil survey may be necessary, especially when targeting individuals without reliable internet access or when conducting in-person meetings with community members. In such cases, you can adopt a hybrid survey in which most respondents complete the survey online while you provide paper surveys for specific situations.

Decide What Tool to Use

When using multiple survey formats simultaneously, maintaining consistency in survey content across all formats is imperative to ensure that data collected by one method aligns with data collected by another.

Various online survey tools are available, each offering distinct features. Some are free, whereas others come with modest costs. When selecting an online survey tool, consider the following issues:

- **Question Types and Logic.** Consider what types of questions the tool supports, such as multiple choice, text entry, matrix/rating scale, and more. Evaluate whether the tool offers skip logic³ and branching capacity⁴ and whether these question types and logic features align with your specific survey needs.
- **Survey Distribution Channels.** Examine the tool's available channels for survey distribution, including sending a survey link, providing a QR code, or sending individualized invitations. Ensure that the tool can present the survey format appropriately on a range of devices (e.g., mobile phones, computers, tablets) and confirm that these features align with your survey distribution plan.

³ Skip logic is a feature in surveys that changes the next question or page depending on how a respondent answers the current question.

⁴ Branching capacity in a survey changes the survey questions a respondent receives based on their answers to specific questions.

- **Data Security.** Assess how the tool maintains data security to ensure the safe storage of your survey and collected data. Check whether the tool offers an option for anonymous surveys, as required by your survey design.
- **Data Export Formats.** Explore the data export formats supported by the tool and determine whether these formats are compatible with your data analysis needs.

These considerations are essential when selecting an online survey tool, as they play a pivotal role in the success of your data collection process.

Select Sampling Methodology

Once you have defined the community you want to survey, you will have identified the target population for the survey. If your population is small, you will likely want to try to survey everyone and get as many responses as possible. If your population is large, you need to decide whether you want to try to survey the whole population or a smaller number of people that is representative of the whole population, called a sample. If you are surveying the whole population, you do not need to review the information below about selecting a sample.

As a reminder, whether your intention is to survey the entire population or a sample, effective surveys should include responses from a variety of voices in your community, including those that are often underrepresented. The choice between surveying the whole population or using a sample will typically hinge on factors such as population size, available resources, and your ability to reach the entire population effectively.

When opting to survey a sample of the population, you have several methods for sampling available depending on the specific conclusions you aim to draw.^v If your goal is to ensure that the sample is representative of the target population, a probability sampling design is essential.^{vi} In addition, you will need to make a decision regarding whether you would like to report data for particular groups within the target population, such as English Learners or families of students with disabilities. A [resource](#) from the Regional Educational Laboratory, Northeast and Islands, discusses some of the sampling options and considerations.

Estimating a Sample Size

If you have decided to survey a sample of your community, you will then need to make some decisions to determine the sample size. You will need to know the size of the population and decide how precise you want your results to be. For simple samples, there are online calculators that provide basic instructions to estimate the sample size. For samples that are complex, you should consult with a professional with sampling experience.

After you determine the sample size, you will want to think about the likely number of responses you will receive to your survey, or your response rate. Depending on the response rate, you may need to increase your sample size in order to ensure you have a sufficient

number of responses. You want to ensure that your survey collects responses from all significant populations within your community. You also want to make sure you have enough responses to make decisions. While response rates can vary, the National Center for Education Statistics recommends a response rate of 85 percent as a benchmark for making claims about a target population based on a sample.^{vii} If you are surveying the whole population, the overall response rate will likely be much lower than 85 percent.

For online surveys, studies have shown an average response rate of 44.1 percent.^{viii} It is worth noting that response rates can vary depending on the method used and the audience surveyed. In some cases, parent surveys conducted by their own schools or school systems have yielded higher response rates than the average, as observed in a search of district websites.

In summary, when determining a sample size, consider the need for representation across multiple population groups, the likely response rate, and the precision of the results you want in making well-informed decisions for your specific survey.

Selecting the Sample

Once you know how many people to survey, you need to select the sample. To do this, you will need a list of all individuals in the population. Using the list, you can randomly select individuals who will receive the survey. In many cases, this may not be possible because a list is not available. In those cases, you can use the outreach strategies described below to have people complete the survey.

Design Survey Items

Before drafting your own items, consider searching and reviewing existing surveys with the same or similar purpose as that of your survey. This could enable you to adapt existing relevant survey items, which can save valuable time. In addition, consider asking community partners or other relevant interested parties what topics or content areas need to be included in the survey. You can then ask them to help develop or review survey items to ensure they are understood by your potential respondents. When designing a survey, there are a number of considerations for adopting or designing survey items. Survey items should adhere to the following:

- They should ask questions that are directly related to your scope and purpose.
- They should be direct; ensure questions are worded clearly and concisely.
- They should “mean the same thing to all respondents.”^{ix} This uniformity is pivotal for obtaining accurate and meaningful survey data.

Here are a few tips to help you accomplish these goals:

- Organize your questions in a logical order by topic, beginning with straightforward content.^x
- Make sure your questions are clear, specific, and direct.^{xi}
- Avoid the use of technical terms, acronyms, or jargon that your audience might not understand.^{xii}
- Avoid complex sentences and make sure you ask one question at a time.^{xiii}
- Use open-ended (free response) and closed-ended (provide discrete answer choices) questions when they are appropriate. Open-ended questions require more effort for the person filling out the survey and the team analyzing the data but can yield a greater variety and, sometimes, more detailed responses.^{xiv}
- Consider piloting open-ended questions to identify the most common responses and use them for closed-ended questions.^{xv}
- For a more comprehensive summary on tips for designing effective survey questions, see a [tip sheet](#) on question wording from Harvard University.
- Keep your survey brief and precise to prevent participants from getting tired or losing interest.
- Depending on your sample, consider providing a translation of the survey in the main language of your target audience.

Pilot Your Survey

Piloting your survey questions with your target population is a critical step in ensuring clarity and alignment with your intentions. Whenever feasible, convene a meeting with a group of individuals from the target population to discuss the survey items and elicit their feedback.^{xvi} Use their input to refine the survey, ensuring both that the purpose of your survey is clear to participants and that questions are straightforward and user-friendly. Utilize your community partners to refine your survey's messaging and uncover participants' motivations for taking the survey. Review the messaging that you are using and ensure it begins by explaining to the audience why you are surveying them. During your pilot, be sure your team spends time ensuring the clarity of survey questions. If responses indicate a need for clarification or if respondents express concern about the clarity of a given question, teams should promptly convene to address potential adjustments to the questions.

As a team, conduct a thorough evaluation of the survey itself during your pilot period, considering the following questions: Is your messaging and purpose clear in the introduction of your survey? Is the wording of the questions themselves clear? Is the survey an appropriate length? Make adjustments to the survey during the pilot period rather than changing questions midsurvey, which would mean that respondents would see different versions of questions and that data may no longer be valid.

Conduct Outreach

Creating an effective survey demands the participation of a diverse array of voices from your community, ideally encompassing individuals who genuinely reflect the community served by your school, district, or state. This is not an easy task.

Ensure Responses From All Voices

To achieve this goal, your team must take proactive steps to seek out local community members and engage with them, which often requires on-the-ground efforts. Meeting community members where they naturally gather is key; this might involve attending events, visiting places of worship, participating in summer programs, engaging shoppers at grocery stores, and connecting with other community hubs to ensure that these voices are heard.

If your community is defined as families associated with a specific school, consider how to leverage existing touch points, like after-school pickup lines; a physical presence at bus stops; or inclusion of survey links in newsletters, conferences, or school events.

Consider fostering partnerships with community leaders who have well-established connections or collaborating with other community-based organizations to assist in the promoting and marketing of your survey. For a survey to be successful, your team will need to put time and effort into thinking about a wide variety of ways you can meet community members where they are.

Clearly Communicate the Purpose

The members of your community are more likely to engage in your survey if its purpose is clear. Clearly communicate the survey's intended goal, the estimated time required for completion, and how and when a respondent should anticipate survey results.

When sending your survey electronically or in paper format, incorporate the purpose into the text, and maintain the same messaging when conducting in-person outreach. Ensure that any team members who are part of in-person outreach have a clear understanding of your purpose and are prepared to communicate this message to audiences, ideally with a quick “pitch” of less than 15 seconds.

What to Talk About in a Quick Pitch

- **Begin with the “why”:** Clearly communicate why a community member should take the time to complete your survey. Craft your message based on the underlying purpose and scope of your survey.
- **Address motivation:** Explain what motivates a community member to invest their time in filling out your survey. What is the incentive or benefit they can expect to receive from participating?
- **Clarify the commitment:** Clearly state the estimated time required to complete the survey, ensuring transparency and setting expectations for the community member. Mention how long it will take to complete the survey.

Use a Variety of Communication Vehicles

Your organization likely utilizes communication channels for disseminating information; these channels can also serve as effective tools for survey distribution. Consider using preestablished communication efforts such as newsletters, website updates, phone app communication, or social media outlets already in place with your organization.

Take time to reflect on the past effectiveness of your communication vehicles and evaluate their suitability for survey outreach. Reflect upon the intended audiences your team aims to engage, and consider implementing a variety of methods to publicize your survey, ensuring a broader audience is reached. The following are examples of both virtual and in-person communication strategies:

Virtual communication vehicles	In-person communication vehicles
<ul style="list-style-type: none">• Social media outlets, including Facebook, Instagram, X (formerly Twitter), Threads, or Tik Tok• Email blasts• Robocalls or texts• App push notifications• Website updates	<ul style="list-style-type: none">• Door knocking• Flyer distribution• Mailers or newsletters• Word of mouth• Events

Explore collaborations with other community organizations, community leaders, or local businesses to leverage their networks for survey dissemination. Ask these entities to share social media posts, email information to their listservs, or post flyers to broaden your communication reach.

Administer Your Survey

Once you have created your plan for the survey design and designed your questions and the team has thought through all outreach strategies, it is time to administer the tool. First, as a team, determine the length of time during which you plan to actively collect data; this is known as your survey window.

Teams should account for the time needed to collect data using all distribution methods. For instance, if you employ an online survey tool, it is essential to allocate time for follow-up efforts. If your data collection involves in-person interactions, try to synchronize the survey window with community events or gatherings. If you administer surveys by mail, you should also account for delivery time. Typically, a survey window spans about 4 weeks.^{xvii} It is worth noting that some studies have found that a significant proportion of responses tend to arrive within the first 7 days of the survey window.^{xviii} Consequently, we recommend sending reminders to participants at least weekly to stimulate additional responses.

In addition, it is important to ensure that the team takes into account other factors that could extend the survey window, such as community events, religious holidays, or scheduling conflicts. While the plan serves as a roadmap for your survey administration, teams should also remain flexible in their outreach strategies during this period. Survey questions and data must remain consistent, but you should be flexible in your outreach approaches. Collaborations with one community-based organization may lead to connections with others willing to assist in your dissemination efforts. If at some point your team or teams realize that completion rates are falling far lower than your targets midway through the survey window, consider implementing additional outreach activities to enhance participation.

Follow Up on Response Rates

Common challenges faced by many organizations when administering surveys revolve around low or homogenous response rates. To gain context on response rates, begin by revisiting the original sample size goal you developed during the planning phase. Calculate the difference between the number of surveys sent and the number of surveys completed to check your response rates. There are numerous factors to consider that can influence your response rate.

After reflecting on the survey, reflect on the logistics of your survey administration. When was the survey sent out? How many communication vehicles were used to send out the survey? How many reminders were sent? What was the messaging of these reminders?

Strategies to Increase Response Rates Prior to Survey Administration

- Consider allowing anonymous responses.
- Consider incentives for participation.
- Build in time for respondents to complete the survey during community meetings or other events already scheduled.

Consider the motivations that prompted respondents to complete your survey. If the responses appear homogenous or predominantly from a specific demographic or subgroup of your community, it is essential to identify what motivated the smaller population to participate. Reflect on the recruitment methods employed and their locations. Consider the time of day when you engaged in recruitment or disseminated the survey and whether it aligned with the schedules of your community members.

To diversify your outreach and engagement, contemplate expanding your efforts to various locations within the community, sending communication on different days or times that are more accommodating for work and family commitments, or collaborating with new community members or community organizations to broaden your reach.

It is worth exploring the option of providing an incentive for completing your survey if your budget allows. This incentive could take various forms, including cash, gift cards, tangible items, raffles, or other items that you are able and willing to give.

Checking for Representativeness

An important goal of a community survey is to get responses that represent a wide range of voices within your population. Teams should check responses to ensure that they represent a cross-section of the groups from which input is sought. If the survey or item response rate falls short of the intended sample size, you will need to increase efforts to get more respondents.^{xix}

If you determine the responses are not representative, you might want to extend the survey window and proactively engage in outreach efforts to secure responses that truly reflect the broader community. It is important for teams to refrain from drawing conclusions based on survey results that are not representative of the larger population. Teams may also explore various approaches to analyze the collected information, including the examination of disaggregated survey data from specific populations. This diversified analysis can provide a more comprehensive and accurate understanding of the survey findings.

Analyze the Data

A crucial step in any community survey is ensuring that you have the time, staff expertise, and resources to analyze survey data. The information collected through a community survey can feel overwhelming, and it might be challenging for staff without the experience or expertise to conduct an in-depth analysis. Your team might consider hiring external support for analysis or tapping team members who have the expertise and capacity to assist.

Conduct Qualitative Analysis

To begin analyzing qualitative data, such as open-response questions, check for data entry errors, duplicate responses, or other discrepancies that should be filtered out before analyzing survey results. Responses that seem erroneous should be flagged and reviewed more closely and then either corrected or deleted. Next, staff should initiate coding data by examining open-response questions and identifying common themes or categories from the responses. This may take several rounds of data review.

Conduct Quantitative Analysis

For survey questions that resulted in quantitative data, the analysis may be simpler and integrated into the software or survey program you use. However, there might be a more comprehensive narrative behind many of the numbers. Teams should consider benchmarking their survey results against other similar organizations to provide a point of comparison. For instance, if survey results show that 60 percent of families are happy with the available school choice options, having a benchmark can help determine whether 60 percent is a sufficient percentage.

Furthermore, you can glean additional insights from the quantitative and qualitative data collected in a community survey by disaggregating data and examining a subset of the population surveyed to gain a deeper understanding of their specific needs. In addition, when analyzing survey results from a sample, it is important to consider any margin of error. This factor is important for making decisions based on the data.

When analyzing the data, it is also advisable to reevaluate potential bias in survey responses. Bias can manifest in response rates and within data analysis. Once again, teams should refrain from drawing conclusions based on any survey results that do not accurately represent the larger target population.

Communicate and Use the Results

Once your team has thoroughly analyzed the survey results, it is important to disseminate this information to the community members who participated. This audience includes survey respondents, the broader community, and the organizations that aided in your outreach efforts. Community members need assurance that their participation and support were meaningful and that the insights they provided will shape decision-making processes.

Tailor your communication approach based on the specific audience. Consider updating sections of your website, generating informational yet concise 1-pagers, or preparing a PowerPoint presentation for community meetings.

Utilizing diverse formats ensures that the information is accessible to all segments of your community. Use existing communication vehicles like newsletters and social media platforms to reach your audience. Key findings should be clear and easily accessible.

How to Communicate Survey Results

- Website updates
- Social media updates
- Informational 1-pagers
- PowerPoint presentations at community meetings

Use Results to Inform Decision-Making

Once you have analyzed survey results, leverage these data to shape your decision-making process. Teams will likely have different processes for making decisions and will need to involve different individuals.^{xx} There are a variety of ways to weigh community feedback and to incorporate different points of view.^{xxi} This two-prong approach “is a nuanced process that

involves judgement as well as a determination of public good. The feedback should play a meaningful role in informing a decision.”^{xxii}

For schools and authorizers, the data might unambiguously reveal that families in the community desire improved after-care options, specific enrichment classes, or more ways for families to be involved in decision-making. For authorizers, results could clearly show community members’ preference for a specific school model, programming, or wraparound services. In many other scenarios, the data may not offer such clear-cut guidance but can often be used as a valuable point of reference in conversations with staff or in discussions when decisions are being made.

Conclusion

Community surveys can be a valuable tool for gathering community input on educational interests, needs, and aspirations. As described throughout this brief, they take significant planning to ensure that respondents are representative of all community voices, but they are less labor-intensive than conducting focus groups or interviews and generally provide input from a greater number of participants. While there is no one right way to incorporate these data, they are an important input to a community-based decision-making process. Moreover, having data from the voices of community members can strengthen your decision-making process and inform what otherwise may be a top-down decision or discussion.

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