

# USBE policies and procedures for using Qualtrics

## Overview

This document outlines policies and procedures for USBE employees who use the Qualtrics survey platform. The intra-agency implementation of Qualtrics relies on three roles: a Qualtrics data collection lead, two survey consultants, and Qualtrics specialists in each section.

- 1) At the agency level, the **Qualtrics data collection lead** manages and reviews the administration of all Qualtrics-based data collections and maintains an annual calendar of Qualtrics data collections administered by the USBE.
- 2) The **Survey consultants** have training in psychometric principles and practices associated with classical test theory and serve as skilled consultants.
- 3) Any trained USBE employee who uses the Qualtrics platform is considered a **Qualtrics specialist**. These individuals' function as trained, in-house Qualtrics users for their sections and work closely with the Qualtrics data collection lead and survey consultants as needed.

This group meets periodically to facilitate trainings, share ideas, and manage the ongoing implementation of Qualtrics use within the Agency. This includes addressing issues related to USBE policies, practices, and procedures for collecting data through the Qualtrics platform as needed.

## Terms

- **Project:** A project is the name of any data collection instrument created in Qualtrics. This term is specific to the Qualtrics platform.
- **Data collection instrument:** In this context, we use the term data collection instrument to refer to any data collection that does not specifically involve measurement scales<sup>1</sup>.
- **Survey:** we use the term survey in this context to identify Qualtrics projects that include measurement scales.
- **Administration:** In this context, we refer to administration as the practice of sending a project to respondents and collecting data. An *administration window* is the timeframe in which a project is actively collecting data.

## Policies

- Designate one person to serve as a Qualtrics data collection lead and two people to serve as survey consultants. These three will form the core leadership team for the ongoing implementation of Qualtrics use.
- The person in the **Qualtrics data collection lead** role is responsible to develop and maintain a comprehensive intra-agency calendar of projects administered through Qualtrics. The primary functions of this role include:
  - to review and schedule Qualtrics projects administered throughout the USBE
  - to ensure that LEAs and other contacts are not receiving multiple, uncoordinated Qualtrics data collection requests from the USBE
  - to support LEA counterparts in their annual planning by making them aware of relevant USBE data collections well in advance

---

<sup>1</sup> Measurement scales are used to assess psychological constructs such as attitudes, opinions, emotional states, and the like.

- to schedule and facilitate periodic USBE Qualtrics user group meetings,
- to manage data collected through Qualtrics and create reports of results as needed
- to work closely with the survey consultants to provide agency-wide leadership and guidance for the use of Qualtrics
- The **survey consultants** serve as skilled survey development consultants. These two individuals have training in psychometric principles and practices associated with classical test theory. The primary functions of this role include:
  - to provide agency-wide support for creating and implementing surveys and Qualtrics projects. This includes conducting in-house trainings in instrument design and best practices
  - to provide support for the initial implementation and ongoing administration of state-wide Qualtrics initiatives, such as teacher engagement, exit, and school climate surveys
  - to serve as a quality control safeguard for Qualtrics projects,
  - to participate in and contribute to USBE user group meetings
  - to collaborate closely with the Qualtrics data collection lead
- Each USBE section that utilizes Qualtrics shall designate one or more employee(s) to serve as **Qualtrics specialists**. The Qualtrics specialists will serve as trained, in-house Qualtrics users for their sections and will work closely with the data collection lead and survey consultants as needed.
- When a Qualtrics specialist decides to implement a project for her or his section, the first step is to complete a *Project Notification* form. This will allow us to document all Qualtrics use cases in one central location and provide a collective safeguard to ensure that we are not overburdening potential respondents with multiple or similar requests to complete surveys or other data collection instruments within similar time frames. There is no formal approval process for administering a Qualtrics project, rather the data collection lead will review form submissions and contact the form submitter if there is a need to follow up with any aspect of the project.
- While the survey consultants serve as an important safeguard for quality, it will be the responsibility of the section level Qualtrics specialists to administer effective, successful data collection events.
- Qualtrics specialists are ultimately responsible for creating and developing their own projects. Through the leadership and support of the Qualtrics data collection lead and the survey consultants, the Qualtrics specialists will create and administer data collection instruments and surveys for their sections.
- Only Qualtrics specialists will be able to utilize Qualtrics as a data collection tool for their sections.

## Procedures

The following procedures and checklists are for Qualtrics specialists, USBE's primary Qualtrics users. Anyone using Qualtrics to collect data should adhere to the following procedures. When starting a new project, begin by determining if you are measuring something specific, or simply gathering information. Measuring behavior or psychological constructs such as attitudes, opinions, emotional states, and the like requires training and expertise, and should be informed by theory. The survey consultants should be contacted for all survey projects (surveys include measurement scales used to assess behavioral or psychological constructs). Regardless of the data you are collecting, follow best practices. (See Appendix A).

It is beyond the scope of this document to provide comprehensive best practices for survey development and administration. Countless resources are available, and Appendix A offers a few basic resources that provide guidance for developing survey items and questionnaires. As you utilize these resources, realize that although researchers have conducted many studies to identify best practices, divergent views persist on some survey development topics. Focus on your unique context and consider carefully your respondents.

## Checklist for developing and administering Qualtrics surveys at the USBE

### *Getting started*

- Once you have identified the basic parameters of your project (e.g., identified respondents, administration window, purpose of the project), the next step is to complete a Qualtrics *Project Notification* form.
- Determine if you need to bring additional expertise into the project. This might include survey consultants or other experts who can inform content and/or design of the instrument(s).
- If you are interested in administering a project to students, please contact Whitney Phillips, Chief Privacy Officer, for approval.
- Gather materials. Great surveys are not simply made up, they are well-informed. Find other similar data collection instruments, consult experts, read books, and study peer reviewed journal articles.
- If you are creating an instrument in response to legislative action or board rule, study those documents carefully to ensure that you address all required components.
- Before you build the project in Qualtrics, it is often a good idea to use a separate document to draft your data collection instrument. This will give you a valuable source document that is an important record of the process, including items you considered and didn't use. An excel document is good choice. Identify what you are measuring and what the scale points will be. Document the sources that inform each item in the instrument. Appendix B includes a template.
- Complete a data collection and reporting plan (Appendix C). This is an important early step that will support successful data collection and reporting.

### *Creating an instrument in Qualtrics*

- Once you have finalized content, create a new project in Qualtrics.
- Use one of the four pre-loaded, approved USBE themes. Find these in the *look and feel* tab in the project you are building.
- Review best practices (Appendix A). Carefully consider the wording and order of items. Pay close attention to the scales. At this point, you should have a written plan explaining how you will analyze and report findings from the data you collect. For example, knowing how you will use the data should inform how you scale the items.
- Once you have created a project in Qualtrics, do a final check.
  - Have you followed best practices?
  - Are there additional steps you can take to improve the instrument? For example, should you add more page breaks, a back button, or improve the formatting?
  - If you use any type of routing such as display logic or survey flow, test each case to make sure it is working properly. Key questions that include routing should usually be forced choice.

- Use the *preview* feature to view and test the survey from the perspective of respondents.
- Ask a colleague(s) to review the instrument for readability, clarity, and typos.
- Do you need to recode values? During the design process, you may have moved items or scale points. The values of these items and scale points stayed the same, even if moved. For example, if you move the last scale point with a value of 5 to the first position, it will still have value of 5. This can lead to erroneous conclusions during analyses. You may also want to rename blocks, items, or item sets. Taking time to recode values prior to administration will help you avoid errors during and after data collection.
- To ensure everything is working as expected, it may be necessary to collect and review a few rows of fake data.
- Delete the data you generated during the instrument creation and testing process.
- Once the project is finalized, publish it by clicking the publish button on the main survey page. This is the final step in creating the instrument. Once you publish, make no more changes to the project. If you do make changes before administering the project, click publish again.
- Save a pdf copy of the finalized Qualtrics project.

#### *Data collection and final steps*

- Along with the written analysis plan, each project should have a defined administration window. This should include launch dates, close dates, scheduled reminders and the overall distribution plan (i.e., anonymous link, qr code, contact list through Qualtrics, etc.).
- Each project should have a clear communication plan (e.g., who is the intended audience, what is the purpose, how will the data be used, will the results be reported back to the stakeholders).
- Handle sensitive or personally identifiable information (PII) carefully. If your project includes sensitive information or PII that is only intended for the respondent, be certain that you are sending the project to the correct individual and use only their work email address. Similarly, do not use anonymous links for such circumstances, but instead, tie respondent emails directly to the project.
- Before administering the project, send it to a few individuals to check for errors, questions in wording, or other necessary edits.
- Prior to administration, notify respondents of the project, related expectations, and the administration timeline. Provide enough lead time to allow school or LEA administrators to properly plan for administering the project.
- If applicable, consider sending pdf version of the project to key stakeholders.
- Administer the project. Once you do this, **DO NOT MAKE ANY MORE CHANGES**. If you do, you will likely invalidate the data you collect.
- Consider the timing of when you launch the project. Be available to respond to questions about project administration. As the first few responses are collected, make sure you check results. Is everything working properly? Are people using open-ended items to inform you that some portion of the project isn't working properly?
- According to your administration plan, stop the data collection process by closing the project on time.
- After you close the project, download and save a raw csv file. Be aware that you have the option of downloading numeric values or choice text. You may want to save raw files of both. If the data files contain Personally Identifiable Information (PII), be sure to store and share those data securely.
- Process and prepare additional data files from raw files and complete your analyses plan.

## Appendix A: Resources

[Avoiding five common pitfalls of survey design](#)

[Avoiding four visual-design pitfalls in survey development](#)

DeVellis, R. F. (2016). *Scale Development: Theory and Applications (4<sup>th</sup> Ed.)*. Thousand Oaks, CA: SAGE.

[Developing questionnaires for education research: AMEE Guide No. 87](#)

[Panorama Education survey design checklist](#) (scroll down to get PDF download)

[Pew Research Center: Questionnaire design](#)

[Qualtrics top 10 survey pitfalls](#)

[Survey fundamentals: A guide to designing and implementing surveys](#)

## Appendix B: Survey preparation template

Example template for preparing a data collection instrument in excel prior to creating in Qualtrics.

	A	B	C	D
1	<b>Source</b>	<b>Constructs</b>	<b>Definitions and Items</b>	<b>Response Scaling</b>
2	panorama education	Grit	How well students are able to persevere through setbacks to achieve important long-term goals.	
3	panorama education		How often do you stay focused on the same goal for more than 3 months at a time?	Almost never Once in a while Sometimes Frequently Almost always
4	panorama education		If you fail to reach an important goal, how likely are you to try again?	Not at all likely Slightly likely Somewhat likely Quite likely Extremely likely
5	panorama education		When you are working on a project that matters a lot to you, how focused can you stay when there are lots of distractions?	Not at all focused Slightly focused Somewhat focused Quite focused Extremely focused
6	panorama education		If you have a problem while working towards an important goal, how well can you keep working?	Not well at all Slightly well Somewhat well Quite well Extremely well
7	Russell et al., 2009 (p. 35)	Academic Motivation	students' enjoyment and engagement in academic pursuits	
8	Russell et al., 2009		I try hard in school	Stronly Disagree, Disagree, Agree, Strongly Agree
9	Russell et al., 2009		I pay attention in class	Stronly Disagree, Disagree, Agree, Strongly Agree
10	Russell et al., 2009		I come to class prepared	Stronly Disagree, Disagree, Agree, Strongly Agree
11	Miquel et al., 2017		I enjoy learning new things	Stronly Disagree, Disagree, Agree, Strongly Agree
12	Russell et al., 2009		I enjoy reading books for pleasure	Stronly Disagree, Disagree, Agree, Strongly Agree
13	Russell et al., 2009		I enjoy writing	Stronly Disagree, Disagree, Agree, Strongly Agree
14	Russell et al., 2009		I finish my homework	Stronly Disagree, Disagree, Agree, Strongly Agree
15	Miquel et al., 2017		My classes are interesting to me	Stronly Disagree, Disagree, Agree, Strongly Agree
16				
17				
18				
19				

## Appendix C: Data collection and reporting plan

Why do these data need to be collected?

What will you do with the results?

Who is the respondent?

Who is the targeted audience for the results?

What is the proposed data collection administration schedule?

- Include launch dates, close dates, scheduled reminders and the overall distribution plan (i.e., anonymous link, qr code, contact list through Qualtrics, etc.).

What is the plan for data analysis and reporting?

- Will these data be joined to any other data sources?
- If pre and post, how will you match the pre and post responses?
- At what level will data be aggregated or disaggregated?