

# Successful Surveying: The Perfect Plan

Sometimes chatting to a leader about their surveying, it's easy to see why school leadership can feel overwhelming. There are issues at every turn. Things that are changing (when aren't they?). Things that have got harder in recent years as needs of all sorts have increased and budgets haven't. On top of all the usual challenges of leading an organisation full of people with real lives and the ups and downs these bring.

Amongst all of this, when is the right time to survey? And what is it best to focus on?

Sometimes, it's helpful to be given a plan. A clear one. Then you can react to that, and not have to start from scratch. Here it is!

A year in surveys

EXAMPLE Surveying Schedule - 2025/26						
	Autumn 1	Autumn 2	Spring 1	Spring 2	Summer 1	Summer 2
<b>Staff</b>	Vision & policies (first fortnight)	Behaviour Barometer / SDP check-in	Job satisfaction & wellbeing	Professional development	Pause! (Or run a quick check-in)	Celebrating Successes & looking ahead
<b>Pupil</b>		Belonging & community		Exam preparation / Attendance & wellbeing		Transitions / leaving reflections
<b>Parent</b>	Transitions (end autumn 1)		Communication		Pupil belonging & experience	

What's in these surveys? Typically you can expect to find a template of around 6 - 10 questions that we know have been popular with school leaders. The first is the 'content' measure; the last is an open response question. None are mandatory. All of them will lead to benchmarked insights within the reports that are automatically generated when the survey closes.

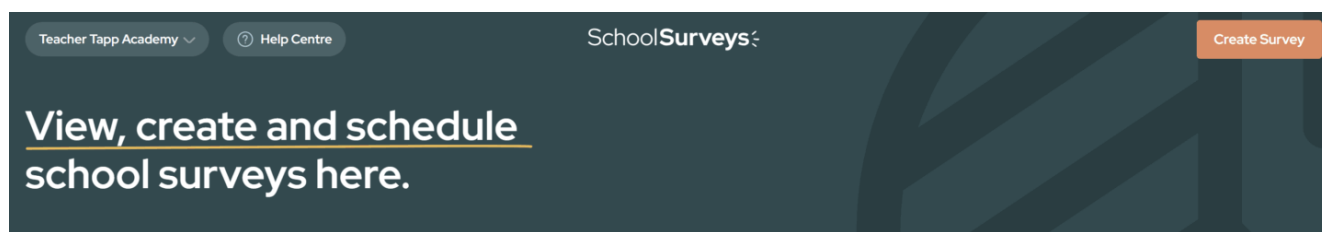
Roughly, this is what to expect:

- Autumn 1 - vision and policies: a chance to check in with the whole team and gauge how clear everyone feels about the year ahead, the school's expectations and the direction we're aiming to go in.

- Autumn 2 – behaviour barometer: behaviour is consistently top of the Teacher Tapp panel's list of concerns and these questions give you a chance to see where the pinch points are that need more focus. You may also have specific SDP areas that you'd like to ask about and this is an ideal time to get a sense of the first term's progress with these.
- Spring 1 – job satisfaction and wellbeing: here's your chance to find out what is most likely to help you motivate and retain staff as you reach the mid-year point.
- Spring 2 – professional development: check in with CPD impact and consider again gathering views on SDP progress. Depending on the length of the spring term, you may only choose to run only one of these two surveys, or an amalgamation of the two.
- Summer 1 – pause: it's exam season and there's a lot going on!
- Summer 2 – celebrating successes and looking ahead: this is a great time of year to ask staff to reflect on what has gone well as well as contribute thoughts for or on the emerging plan for the next year.

Commit now – tweak later (or not...)

Once the surveys have been scheduled, you can pursue all the hard work of leading your team, knowing that these surveys are ready to go out at the appropriate points during the school year. You can even add staff email addresses into the portal so that our system does all the notifications and reminders for you. You can simply await the report as each survey closes.



ALL **SCHEDULED** OPEN CLOSED

Status	Survey type	Start date	End date	Template
SCHEDULED	STAFF	26th May 2026 - 16:00	3rd July 2026 - 00:00	CELEBRATING SUCCESSES AND LOOKING AHEAD
SCHEDULED	STAFF	24th February 2026 - 16:00	28th March 2026 - 00:00	PROFESSIONAL DEVELOPMENT
SCHEDULED	STAFF	6th January 2026 - 16:00	13th February 2026 - 00:00	JOB SATISFACTION AND WELLBEING
SCHEDULED	STAFF	3rd November 2025 - 16:00	19th December 2025 - 00:00	BEHAVIOUR BAROMETER
SCHEDULED	STAFF	8th September 2025 - 16:00	1st October 2025 - 00:00	VISION AND POLICIES

A list of scheduled staff surveys in the School Surveys portal, covering the year ahead

You might like to check in as the time nears for each survey to go live. You can invite colleagues into the portal and collaborate with them, re-visiting and previewing the scheduled survey and seeing if there are any tweaks that you'd like to make. Up until the point when a survey opens, it is possible to make as many changes as you wish.

What sorts of changes might you want to make and why?

- Adding extra questions. For example, there may be something you want to track progress on from last year, or a strand of the SDP that feels particularly important to take views on.
- Deletions - just as important as covering what you need, make sure you consider what not to ask. Don't let a survey get too long. Past 10 questions and you may have people struggling to get to the end.
- Adjusting the survey window:

We'd suggest a few golden rules to bear in mind: keep surveys fairly short; have a slot for people to complete the them in (five minutes at the start of a staff meeting say?); and schedule in your plan for sharing outcomes. "You Said, We Did..." helps build trust, even if sometimes you are saying, "Here's why we aren't doing X".

### Making your own plan

Our Perfect Plan is all very well, but even better is to make your own. You can simply schedule your surveys directly into the portal, but sometimes it's nice to work off a separate document that you can circulate separately and pore over together in a meeting. We've created this template to give you a suggestion of how to go about it:

Surveying Schedule - 2025/26						
	Autumn 1	Autumn 2	Spring 1	Spring 2	Summer 1	Summer 2
<b>Staff</b>						
<b>Pupil</b>						
<b>Parent</b>						

However you choose to approach surveying, and whatever frequency you set, remember that it is all about building a culture of communication and trust. Our mission is to help you use surveys as a powerful tool to support you in this endeavour. We wish you well with your planning and we are always on hand to talk things through.