

Conversation Starter Tools: A Participatory Research Guide to Building Stronger Family, School, and Community Partnerships

By Emily Markovich Morris, Laura Nora, and Rebecca Winthrop
With Max Lieblich, Sophie Partington, and Claire Sukumar

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The CSTs are a living resource that may evolve over time. If you have questions about the tools or would like to use them, please contact:

fscengagement@brookings.edu.

Key Terms

Community	Individuals, groups, and organizations that support schools, students, and/or families.
Educators	All personnel working in a school or a learning institution (including nonformal settings) helping children to learn, including teachers, teaching assistants, administrators, staff, and specialists. Although families are also educators, this term is specific to those who have a specialized role in a school or learning institution. Teachers are individuals whose vocation is to instruct and guide children in the classroom or learning center. School leaders are individuals responsible for the welfare and operations of schools, including principals, head teachers, headmasters, chancellors, school directors, and assistant leaders.
Families	Individuals who play a leading role in caregiving, including caregivers, guardians, and extended family members— from grandparents to aunts, uncles, or cousins. Family includes those who participate in the caregiving of a child beyond biological relationships.
Family involvement	The different ways that families participate in students' learning and development, such as school activities or communication with schools. Unlike engagement, family involvement is not necessarily focused on developing sustained partnerships between families, schools, and communities and is often initiated from the side of the school.
Family, school, and community engagement	The many ways that families, educators, and community groups work together to promote student learning and development and to support schools to thrive. Family, school, and community engagement varies depending on the context, but the intention is to support greater collaborations and partnerships that ensure teaching and learning is equitable, inclusive, high-quality, and relevant.
Schools	Structured settings of teaching and learning. School is used throughout this document to mean learning institutions, both formal and nonformal. In different jurisdictions around the world, the term for learning institutions will vary.
Students	Children, youth, and/or adult learners of all levels and ages who are studying in schools or learning institutions.
Conversation Starter Tools (CST) team:	Families, educators, and community members working together to use the Conversation Starter Tools and further family, school, and community engagement partnerships.

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Background

Family, school, and community engagement encompasses the many ways that families, educators, and community groups work together to promote student learning and development and to support schools to thrive. Although forms of engagement vary depending on the context, the intention is to support greater collaborations and partnerships that ensure teaching and learning is equitable, inclusive, high-quality, and relevant. Stronger family, school, and community partnerships are critical to educational systems transformation.

In 2018, the Center for Universal Education (CUE) at the Brookings Institution began an initiative to build greater family, school, and community engagement research, policy, and practice. In collaboration with nearly 50 government, civil society, and school teams, CUE developed the foundational publication [Collaborating to Transform and Improve Education Systems: A Playbook for Family-School Engagement](#) (2021), or the “Playbook,” which encompasses three years of global research and makes the case for why family, school, and community partnerships are essential for educational systems transformation. The Playbook includes global strategies developed and tested by schools and communities around the world, and an initial version of the Conversation Starter surveys.

During the development and dissemination of the Playbook findings and strategies, the need for a comprehensive set of participatory and open-access tools that could guide schools, districts, and civil society organizations through their own community-based research and strategy development process was identified. School and community teams working to strengthen partnerships with families were eager for an approach that enabled them to collectively reflect on their beliefs and experiences and to simultaneously build relational trust and a shared vision for family, school, and community engagement. This set of mixed methods tools, the Conversation Starter Tools (CSTs), was developed and piloted in collaboration with teams on six continents during the period of June 2022 to December 2023. The CSTs were utilized by teams in Australia, Bangladesh, Brazil, Colombia, England, Ghana, India (Maharashtra and Tripura), Hungary, Kazakhstan, Kenya, Netherlands, Sierra Leone, South Africa, Tanzania (Zanzibar), Uganda, and the United States (California). An overview of the CST methodology and objectives is presented alongside each of the tools to guide schools and community teams through implementing the process in their context. Findings from this collaborative research pilot are detailed in [Six Global Lessons on How Family, School, and Community Engagement can Transform Education](#). Technical details on validation and field testing are outlined in *Technical Report: Six Global Lessons on How Family, School, and Community Engagement can Transform Education*.

About the Conversation Starter Tools

- **What are the Conversation Starter Tools and who should use them?** The CSTs are a set of surveys, conversation guides, and other protocols that can be used by school, district, and/or community organizations to conduct participatory and community-driven research within schools. The CST process guides school/community teams in identifying educators', parents', and students' beliefs on education, relational trust, and types of and barriers to family involvement.
- **What is the goal of the Conversation Starter Tools?** The goal of the CSTs is to provide schools and community teams with a methodology for examining the landscape of family, school, and community engagement in their context, and a process by which they can develop greater relational trust and craft a shared vision of how to build stronger family, school, and community partnerships. Through this community-driven research process, family, school, and community engagement strategies relevant to each context emerge and are integrated into school practices and policies. Developing a shared vision is a critical part of the CST process, and teams should decide what kind of partnership they are aiming for. Four examples of different versions of family, school, and community partnerships are below.

Versions of Family, School, and Community Engagement Partnerships



PARTNERSHIP SCHOOL

All families and communities have something great to offer. Schools do whatever it takes to work closely together to make sure every single student succeeds.



OPEN DOOR SCHOOL

Families can be involved in many ways. Schools are working hard to get an even bigger turnout for the activities. When families are asked to help, they often respond.



COME IF WE CALL SCHOOL

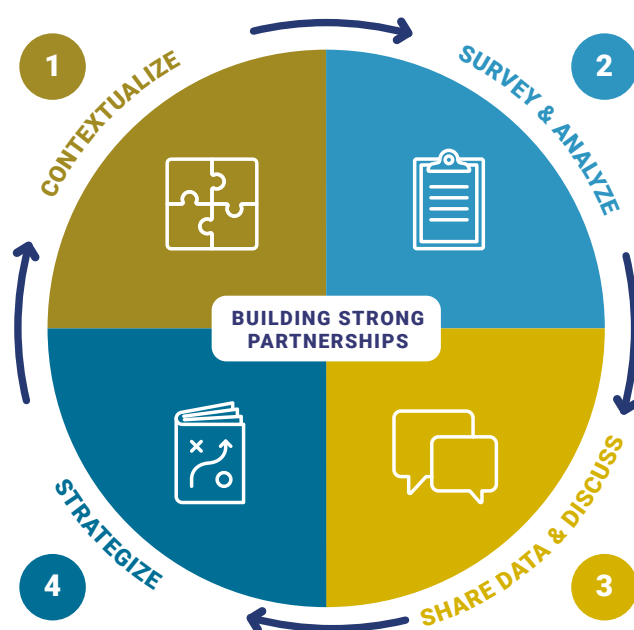
Families are welcome when the school asks them, but there is only so much they can offer. The most important thing families can do is help their kids at home. The school knows where to get community help, if needed.



FORTRESS SCHOOL

Families belong at home, not at school. If students don't do well, it's because their families don't give them enough support. The school is an oasis in a troubled community, and it should stay that way.

- **What are the Conversation Starter Tools not intended to do?** The CSTs are not intended to judge or assess schools or community teams, but rather to map different beliefs and perspectives and to help schools develop relational trust with families and students and to create contextually relevant strategies to build stronger partnerships.
- **What is the Conversation Starter Tools process?** The CST process follows four key steps as shown in the diagram below.







- Step 1. Contextualize:** Think through why teams are conducting this community-driven research (objectives), the design they will use (research design), who will participate (sample and demographics), and planning considerations (logistics).
- Step 2. Survey & analyze:** Administer surveys to families, educators, and students (over 14 years of age) either in-person or remotely. Analyze and visualize data in easy-to-understand formats for schools to use.
- Step 3. Share data & discuss:** Organize intentional conversations among families, educators, and students to share, reflect on, and discuss the findings. Use conversations to build relational trust.
- Step 4. Strategize:** Based on conversation and survey data, identify contextually relevant strategies that build stronger family, school, and community partnerships.



Contents of the Conversation Starter Tools

The CSTs include seven tools to be adapted based on each CST team's context, objectives, and demographics.

Step	Tool	Description
1. Contextualize 	Tool 1: Contextualization Checklist	Guides development of the research design and adapting survey tools to the relevant context.
2. Survey & Analyze 	Tool 2: Surveys	<p>Family Survey for parents/caregivers, guardians, or others responsible for children's care and wellbeing.</p> <p>Educator Survey for teachers, teaching assistants, administrators, staff and specialists, leaders, and others working in schools, learning institutions, districts, etc.</p> <p>Student Survey for students 14 years and above who are in schools or nonformal learning institutions, or recently out-of-school.</p>
	Tool 3: Field Testing Checklist	Guides testing of the surveys to make sure questions and responses are understandable, relevant, textually appropriate, and accurate.
	Tool 4: Analysis Checklist	Guides prepping and cleaning, analyzing, and visualizing the survey data.
	Additional Guidance: Data Collector Training & Survey Data Snapshot	
3. Share & Discuss 	Tool 5: Conversation Guide	Guides planning, facilitating, and documenting intentional conversations with survey participants.
	Tool 6: Global Rubrics Tool	Guides the identification and assessment of family, school, and community engagement practices and policies.
4. Strategize 	Tool 7: Strategy Guide	Guides the utilization of the survey and conversation findings to identify and develop implementable and contextually relevant strategies.

The CST Timeline

The whole process takes approximately four to six weeks; surveying takes about two weeks. The timeline below outlines the length of each step along with the accompanying tools.

Action	Tools
 Step 1 : CONTEXTUALIZE	
<input type="checkbox"/> Develop a CST plan	Tool 1: Contextualization Checklist
<input type="checkbox"/> Translate and modify surveys	Tool 2: Surveys
 Step 2 : SURVEY & ANALYZE	
<input type="checkbox"/> Field-test surveys	Tool 3: Field-testing Checklist
<input type="checkbox"/> Program and prepare surveys	Survey Platforms
<input type="checkbox"/> Train survey data collectors	Data Collector Training
<input type="checkbox"/> Administer surveys	Tool 2: Surveys
<input type="checkbox"/> Clean, analyze, and visualize survey data	Tool 4: Analysis Checklist
 Step 3 : SHARE & DISCUSS	
<input type="checkbox"/> Plan and conduct intentional conversations	Tool 5: Conversation Guide
<input type="checkbox"/> Analyze conversation data and document findings and learnings	
<input type="checkbox"/> Furthering intentional conversations	Tool 6: Global Rubrics Tool
 Step 4 : STRATEGIZE	
<input type="checkbox"/> Use data and findings to develop and enact strategies	Tool 7: Strategy Guide

Level of Effort	Description	
		
2-3 days	Identify the research scope, key demographics, and other contextual considerations.	
2-3 days	Modify survey questions and translate as needed.	
		
1-2 days	Test surveys with 6-7 people. Finalize survey language.	
1-2 days	Program electronic survey or format paper survey.	
1 day	Identify and train data collectors.	
Varies by sample size	Administer surveys to families, educators, and students. Monitor data for quality as it is collected.	
3-4 days	Clean, analyze, and visualize survey data.	
		
2 hours / school	Plan the intentional conversations with all sampled schools.	
2-3 days	Capture and synthesize conversations. Use survey and conversation data to develop overarching findings and synthesize takeaways.	
3-4 days	Assess family, school, and community engagement practices and policies.	
		
Depends on context	Determine key strategies and identify next action steps.	

Overarching Guidance



Step 1: Contextualize

What ages/grade levels are these tools appropriate for?

The process can be conducted in early childhood development centers, primary schools, or secondary schools.

What languages are the Conversation Starter Tools available in?

The full CSTs are in Arabic, English, French, Portuguese, Spanish, and Swahili. The surveys currently exist and were validated in the following languages: Arabic (Modern Standard), Aringati, Bangla (Bangladesh and India), Dutch, English, Farsi, French, Gimara, Hindi, Hungarian, Kazakh, Krio, Lugbarati, Madi, Mandarin, Portuguese (Brazil), Punjabi, Russian, Spanish (Latin America), Swahili, Vietnamese, and Xhosa.



Step 2: Survey & Analyze

How long does each survey take? Are the surveys anonymous?

Each survey is 15 to 20 questions and takes roughly eight to 10 minutes (12 to 15 minutes if surveying orally). The surveys do not collect any personal identifying information (i.e., name, contact information) to ensure that data cannot be traced to any individual.

How are the surveys administered?

Administration of the surveys will depend on the context, but using mixed formats (i.e., in-person oral survey, remote survey links, oral mobile phone survey, etc.) extends the reach and inclusion of participants. The survey process should be made as easy as possible for participants. Things to consider when deciding on the survey administration format include: access to technology and Internet connectivity, literacy levels of participants, familiarity with/culture of taking surveys, and other demographic factors. For example, if educators have mobile phones and are familiar with taking surveys, sending them survey links to complete on their own

may be sufficient. For families, multiple formats are recommended, i.e., giving them the option to complete the survey through a link, over the phone, AND in-person. Data collectors could meet one-on-one with families at school drop-off or pickup. Students can complete the survey on paper or via tablets, computers, or phones. Having a trained facilitator lead students through questions ensures consistency.

How many schools should be included in the survey sample?

The number of schools depends on how CST teams intend to use the data. For example, if the CST team wants to sample a single municipality or district/ jurisdiction, they may start with only a few schools. If the CST team wants data to inform national programs or policy, they will need a nationally representative sample.

How many families, educators, and students should be surveyed in each school?

In order to analyze the survey results by different demographics (i.e., gender, race, language, etc.), it is recommended that all educators in the school take the survey (including education leaders and specialists). This will avoid selection bias and help all educators feel included. If CST teams want to analyze families by different demographics, it is recommended that CST teams invite a targeted sample at each school that is large enough to disaggregate by demographic. Target sampling by specific grades is recommended to ensure as many families as possible from given grade levels participate. For example, if the school has 200 students and an average class size of 40 students, CST teams may invite families of two to three classes to participate. Targeted outreach to families in select grades will help ensure a higher response rate as opposed to giving the survey to all families at the school and having responses spread across grades. This will ensure grade-level analyses can be conducted on a representative sample. Teams should provide special outreach and assurances (i.e., oral survey options, translations, disability accommodations, etc.) to ensure that families' literacy levels, spoken/written language, familiarity with surveying, and other characteristics do not pose a barrier to them taking the survey. If CST teams are surveying students (ages 14+), targeting students and parents/ caregivers from the same families is recommended.

Have the surveys been validated? How?

Yes. In the initial phase of research (2018-2021) validation was conducted across 10 sites (i.e., school districts) in seven countries; construct validity was conducted to ensure that the surveys were consistently measuring the constructs and tracking variability across the different sites. In the second phase of research (2022-2023), construct validation was conducted with CST teams in 16 countries on six continents. Questions were also examined across sites to explore their stability in different settings.

A relational trust scale was initially constructed with five to six questions.* The scale reliability was analyzed with family and educator data from seven countries. Cronbach's Alpha coefficients were calculated using six questions from the family survey and five questions from the educator survey; the reliability ranged from 0.66 to 0.97. Student data were collected in four countries and the reliability of six questions ranged from 0.73 to 0.81 using Cronbach Alpha. See the *Technical Report: Six Global Lessons on How Family, School, and Community Engagement can Transform Education* for more details.

Should incentives be offered to participants taking the surveys?

Depending on the context, small gifts (e.g., food, soap for laundry, etc.) for families who participate in in-person surveys are always appreciated and encourage higher participation. It is not advised to offer money as it may set up the expectation that families should be paid for their participation in schools and could undermine later strategies to promote family engagement. An education-related gift for student participants could also be provided (e.g., notebooks, protractors), but this will vary by jurisdiction and accepted practices.

Step 3: Share & discuss

What are intentional conversations? What is the purpose of the conversations?

Critical to the CST process is discussing the survey findings with small groups of surveyed participants. Intentional and structured conversations provide valuable time and space for participants to reflect on the diverse beliefs, barriers, and opportunities for engagement collected through the surveys and to build relational trust through active listening and dialogue. Ideally, CST teams can also use these conversations to develop a shared vision with tangible strategies to support greater collaboration and partnerships between families, schools, and communities. The takeaways and main points from these conversations serve as important data for the final analyses and strategy development. See the Conversation Guide for details.

Who should participate in the conversations?

Conversations should include a diverse group of educators, families, and students. Only those who took the surveys should partake in the conversations.

Note: The final relational trust scale has seven questions. During the pilot process, one of the relational trust scale's questions was combined into a single question and was later divided into two questions.

Limiting conversations to 10 to 12 participants will ensure each person has an opportunity to contribute (for example, four educators and six parents/caregivers). When including students in these conversations, make sure students have an active role and their perspectives are equally valued. Holding separate student conversations gives youth space to discuss their perspectives. A neutral facilitator, such as a family coordinator or liaison who understands the survey findings, should be designated for each conversation. Ideally, school leaders should not lead discussions, as it is difficult for them to be seen as neutral.

How many conversations are needed to identify strategies?

CUE recommends that conversations be held in each school that participates in the surveys. The number of conversations in each school will depend on the CST team's objectives. For example, if the objective is to provide recommendations to school leaders, teams may only need one meeting. If the objective is to develop a new school partnership or practice, more meetings may be needed to achieve this.



Step 4: Strategize

What kind of strategies emerge through the process?

Strategies are grouped into six categories: providing information, building relationships, shifting mindsets, building skills, providing resources, and designing policies or practices. Some of these strategies can be developed very quickly, such as developing new communication plans with families, while others - like creating a new district or school policy - take more time. Strategy examples can be found in CUE's [Strategy Finder](#), a comprehensive database of different examples from around the world.

Are there any tools for assessing current family, school, and community engagement practices?

Yes. The Global Family, School, and Community Engagement Rubrics Tool guides school personnel (teachers, staff, and leaders) in collaboration with families to assess where schools are at with building family, school, and community partnerships and to map where they want to go. The original version of the rubrics tool was developed by experts at the Colorado Department of Education and Johns Hopkins University in the US, but experts from six countries co-created and piloted the Global Rubrics Tool together with CUE.

Step 1: Contextualize



Tool 1: Contextualization Checklist

About

The Contextualization Checklist guides CST teams through the decisions and actions they need to plan and design their community-driven research. This includes identifying the objectives of engaging in this process and the design they will use, sample and key demographics, and logistics.

Purpose of Contextualizing

Contextualizing ensures that CST teams are centering equity and inclusion in their research planning and design and are being responsive to their families, educators, and students in developing a shared vision.

Guidance

The Contextualization Checklist is divided into three parts: a) planning and design, b) demographics, and c) logistics. Detailed decisions and action items are outlined as well as considerations CST teams should think about when making decisions and developing a shared vision.

Contextualization Checklist

Questions	Decision/Actions (select all that apply)	Considerations
Planning and design		
1. Who will lead the CST process?	Define the CST team members by role.	<i>Composition will vary depending on the school or community and available people and resources.</i>
2. Where is your school(s) or community(s) with family, school, and community engagement?	Review the list on page 10 above and determine as a team, which version of family, school, and community partnerships best describes your school or community on the continuum.	<i>Determine what version of family, school, and community partnerships reflect the context, and that teams want to work towards. This is critical to building a collective vision.</i>
3. Where do you want to be as a team by the end of the CST process?	Review the list on page 10 above and decide as a team which version you would like to work towards.	
4. What are your objectives in conducting the CST process in your school(s) or community(s)?	In your own words, describe your team's specific objectives for conducting the CST process.	<i>Examples of objectives may include:</i> 1. <i>Providing information</i> 2. <i>Building relationships</i> 3. <i>Shifting mindsets</i> 4. <i>Building skills</i> 5. <i>Providing resources</i> 6. <i>Designing policies or practices</i>
5. What grades or levels of education will this process cover?	<input type="checkbox"/> Pre-primary/Early childhood development <input type="checkbox"/> Primary <input type="checkbox"/> Middle/Junior/Lower Secondary <input type="checkbox"/> Secondary/Higher secondary <input type="checkbox"/> Other _____	<i>Options will vary depending on the education system.</i>
6. What kinds of schools/ learning institutions will participate in this process?	<input type="checkbox"/> Government (Public) <input type="checkbox"/> Private <input type="checkbox"/> Community <input type="checkbox"/> Nonformal institutions <input type="checkbox"/> Religious School <input type="checkbox"/> Charter School (U.S. Only) <input type="checkbox"/> Other _____	<i>Options will vary depending on the education system.</i>

Questions	Decision/Actions (select all that apply)	Considerations
7. Who will you survey?	<input type="checkbox"/> Families (parents/caregiver/guardians) <input type="checkbox"/> Educators (teachers, education leaders, etc.) <input type="checkbox"/> Students (age 14+)	<i>Including at least two participant groups (i.e., families and educators) will allow you to compare perspectives, which is critical to this process and approach.</i>
8. For the Family Survey, who will you survey?	<input type="checkbox"/> Will not use the family survey <input type="checkbox"/> Parents/caregivers/guardians <input type="checkbox"/> Other _____	<i>Only one member from each family (i.e., mother or father) should participate in the surveys.</i>
9. For the Educator Survey, who will you survey?	<input type="checkbox"/> Will not use the educator survey <input type="checkbox"/> Teachers and teaching specialists <input type="checkbox"/> Assistant teachers and paraprofessionals <input type="checkbox"/> Non-teaching staff (e.g., librarians, school psychologists, etc.) <input type="checkbox"/> Principals/head teachers (including assistants) <input type="checkbox"/> Education leaders (outside of school) <input type="checkbox"/> Other _____	<i>Ensure participating educators have enough contact with families to answer the survey questions successfully.</i>
10. For the Student Survey, who will you survey?	<input type="checkbox"/> Will not use the student survey <input type="checkbox"/> Current students between ages/grades of ____ <input type="checkbox"/> Recent students who studied in the past ____ years <input type="checkbox"/> Out-of-school youth in a nonformal program <input type="checkbox"/> Other _____	<i>If using the student survey, consider the appropriate age/grade of participating students (ideally age 14+).</i>
11. What is your sample size for each school and participant group?	____ # of schools ____ # of families per school (by grades ____) ____ # of educators per school ____ # of students per school (by grades ____) 	<i>The number of schools and participants within schools depends on how CST teams intend to use data. See the Overarching Guidance for more considerations.</i>
12. In which languages will the surveys be administered?	<input type="checkbox"/> Family Survey languages: _____ <input type="checkbox"/> Educator Survey languages: _____ <input type="checkbox"/> Student Survey languages: _____	<i>Consider what languages families speak at home and make sure surveys are translated into these languages. See guidance in Tool 3: Field Testing Checklist.</i>

Questions	Decision/Actions (select all that apply)	Considerations
13. What are the expected literacy levels of participants?	Families <input type="checkbox"/> Can read survey <input type="checkbox"/> Cannot read survey Educators <input type="checkbox"/> Can read survey <input type="checkbox"/> Cannot read survey Students <input type="checkbox"/> Can read survey <input type="checkbox"/> Cannot read survey	<i>Ensure families have literacy levels required to read the survey; offer oral surveying to ensure inclusion of low literacy families. Employ simplified language and images.</i>
14. What format will you use to administer surveys?	Family Survey <input type="checkbox"/> Link <input type="checkbox"/> Phone call <input type="checkbox"/> In-person Educator Survey <input type="checkbox"/> Link <input type="checkbox"/> Phone call <input type="checkbox"/> In-person Student Survey <input type="checkbox"/> Link <input type="checkbox"/> Phone call <input type="checkbox"/> In-person	<ul style="list-style-type: none"> • Consider multiple formats to reach marginalized participants, including those without Internet connectivity. • Be mindful of how persons with disabilities can access these surveys. • Determine the survey platform (i.e., Kobo Tools, Qualtrics, Google Forms) you will use. If participants have limited Internet, ensure the platform allows offline entry.
Demographics		
15. What are the demographics that are critical to include in the surveys?	<input type="checkbox"/> Geography (e.g., region, urban/rural) <input type="checkbox"/> Ages of students <input type="checkbox"/> Type of school (e.g., private, public, community) <input type="checkbox"/> Primary language spoken <input type="checkbox"/> Education level and/or socioeconomic status <input type="checkbox"/> Gender <input type="checkbox"/> Racial and/or ethnic groups <input type="checkbox"/> Disabilities (types) <input type="checkbox"/> Other _____	<i>Make sure you include questions that cover the critical demographics. Other demographic questions should be added according to the context.</i>
16. How will you measure socioeconomic status?	Identify how socioeconomic status will be asked on the survey. Examine precedence in your community.	<i>Discuss how to ensure that different socioeconomic groups are included.</i>
17. How will you measure gender?	Identify how gender will be asked on the survey. Examine precedence in your community.	<i>Discuss how to ensure that different genders are included.</i>

Questions	Decision/Actions (select all that apply)	Considerations
18. How will you measure race and ethnicity?	Identify how race and ethnicity will be asked on the survey. Examine precedence in your community.	<i>Discuss how to best ensure that marginalized racial and ethnic groups are included.</i>
19. How will you measure disability?	Identify how disability will be asked on the survey. Examine precedence in your community.	<i>Discuss how to best ensure that families/students with disabilities are included.</i>
Logistics		
20. Will you offer an incentive for participation in the survey?	<input type="checkbox"/> No <input type="checkbox"/> Yes, small gift (i.e., school supply, phone credit) <input type="checkbox"/> Yes, lottery per a few participants; amount ____ <input type="checkbox"/> Yes, other: _____	<i>Incentives can be issued to each participant, or through a random lottery where select participants receive a larger incentive. Avoid direct financial contributions as it sets up an expectation that engagement requires payment.</i>
21. What will you do to ensure individuals with disabilities can participate?	Describe resources, procedures, and preparation needed to include families, educators, and students with disabilities in the CST surveys and process.	<i>Determine if there are any participants with disabilities that need special accommodations (i.e., low hearing or vision) and plan accordingly.</i>
22. How will you obtain consent?	<input type="checkbox"/> Verbal consent by participant <input type="checkbox"/> Written consent by participant <input type="checkbox"/> Signed consent by caregiver (for students) <input type="checkbox"/> Informed caregiver with no signature (for students) <input type="checkbox"/> Other: _____	<i>Consent should include details on how data will be used, offered incentives, security of data and confidentiality, and contact information of the CST team leader.</i>
23. Do you need approval by an Institutional Review Board or other authority?	<input type="checkbox"/> No; research is to inform internal learning only <input type="checkbox"/> Yes; Institutional Review Board <input type="checkbox"/> Yes; Other form of approval _____	<i>An Institutional Review Board (IRB) is a body responsible for overseeing human subjects protection in your jurisdiction.</i>
24. What other considerations should be discussed?		

Step 2: Survey & Analyze



Tool 2: Surveys

About

The CSTs includes three surveys for families, educators, and students that ask about their beliefs on education, types of and barriers to involvement, and relational trust. Surveys also collect demographic information on participants. It is recommended that the student survey is used with youth aged 14 or older. If surveying younger children, additional field testing is needed.

Purpose of Surveys

The surveys map and compare beliefs, relational trust, and involvement across families, educators, and students. The survey data are not intended to generalize about participant groups but rather to provide a starting point for conversations.

Administration Guidance

When administering the questions on beliefs on education, randomize the order of the responses to ensure there is variance in order.

Adaptation and Translation Guidance

Adaptations to the consent language, survey questions, and response options can and should be made based on the context. Creating thorough and culturally responsive translations of the surveys and other tools is essential to ensuring data are high quality and that the process is inclusive to participants of different education levels, languages and dialects, and other demographics.

Adaptation and Translation Tips

Selecting translators	Criteria for high-quality and culturally responsive translations
<p><i>Consider individuals to translate the CSTs who have:</i></p> <ul style="list-style-type: none"> • Native proficiency/knowledge of the survey languages. • Excellent knowledge of English (source surveys). • Deep knowledge and experience in a country's educational context (i.e., understands the education system in Zimbabwe when translating into Shona) OR deep knowledge of language nuances across contexts (i.e., understands nuances in Arabic spoken across countries and is able to select the most neutral translations possible). 	<ul style="list-style-type: none"> • Avoid translating word for word from the source surveys (i.e., English) and instead capture essence and meaning. • Use the same register (language level and degree of formality) as the source surveys. • Use consistent grammar and conventions (e.g., spellings, verb tenses, subject/verb agreement, etc.). • For gendered languages (i.e., Latin languages) discuss as a CST team the format you will use (i.e., hijos/hijas, hij@s, etc.).
<p>Steps for achieving high-quality and culturally responsive translations¹</p> <ol style="list-style-type: none"> 1. Have two translators translate the same documents on their own, then compare their translations and come to an agreement for the first draft. 2. Share the first translation draft with a group of native speakers who represent different dialects, geographical regions, and other identity markers. Have them discuss translations and collectively decide on changes to the language, creating a second draft. 3. Test the second translation draft with a group of people who resemble the target participants through the Field Testing Checklist. 	

¹ From Douglas, S.P., and C.S. Craig. Collaborative and iterative translation: An alternative approach to back translation. *Journal of International Marketing*. 15(1): 30–43.

Surveys

Introduction and consent for Family, Educator, and Student Survey²

[Replace with your organization/school] is conducting a survey to help us develop better family–school communication and collaboration and to understand your perspectives on education.

Your participation is voluntary and the information we obtain will be treated confidentially. We will not ask your name or other personal identifying information. You can choose to answer or not answer any questions and are free to withdraw from further participation in this survey at any time. If you participate, you will receive [include: information on incentive if offered]. This survey will take roughly 10 to 20 minutes.

Thank you for your time. If you have any questions about this survey, please contact [include lead researcher on your team's name and phone, email, or relevant contact information].

Do you agree to participate?

1. **YES**
2. **NO** (Note: If participant answers “no” do not continue with the survey.)

Student Survey	Family Survey	Educator Survey
School Demographics <i>Notes: Adjust school names and grade levels to your education system. It is recommended to survey students who are 14 years old and above. If families have more than one child in the school system, they may select more than one grade.</i>		
1. Indicate the school that you currently attend. [select one] a. [list your schools] b. [list your schools]	1. Indicate the school that your child/children currently attends. [select one] a. [list your schools] b. [list your schools]	1. Indicate the school where you currently teach. [select one] a. [list your schools] b. [list your schools]
2. In which grade are you/ were you last enrolled in this school? [select one] a. [list grades that apply] b. Additional (please specify)	2. At this school, what grade is/are your child/children in? [select all that apply] a. [list grades that apply]	2. What grades do you currently teach? [select all that apply] a. [list grades that apply]

Student Survey	Family Survey	Educator Survey
Beliefs on Education <i>Notes: If you are administering the survey to the whole school population, consider asking families to think about the oldest child when answering the survey, as they may have multiple children in the school. How families answer questions may vary by child's age. Randomize the response options for questions 3-5.</i>		
<p>3.1 The following questions ask about your beliefs on education.</p> <p>What do you believe is the most important purpose of school? [select top one]</p> <ul style="list-style-type: none"> a. To prepare for further education (e.g. university, vocational, technical school) b. To develop skills for work c. To be active citizens and community members d. To understand oneself and develop social skills or values e. Additional (please specify) f. Don't know/Prefer not to answer 	<p>3.1 The following questions ask about your beliefs on education. [Think about your oldest child at this school when answering.]</p> <p>What do you believe is the most important purpose of school? [select top one]</p> <ul style="list-style-type: none"> a. To prepare for further education (e.g. university, vocational, technical school) b. To develop skills for work c. To be active citizens and community members d. To understand oneself and develop social skills or values e. Additional (please specify) f. Don't know/Prefer not to answer 	<p>3.1 The following questions ask about your beliefs on education.</p> <p>What do you believe is the most important purpose of school? [select top one]</p> <ul style="list-style-type: none"> a. To prepare for further education (e.g. university, vocational, technical school) b. To develop skills for work c. To be active citizens and community members d. To understand oneself and develop social skills or values e. Additional (please specify) f. Don't know/Prefer not to answer
<p>3.2 What do you think your teachers believe is the most important purpose of school? [select top one]</p> <ul style="list-style-type: none"> a. To prepare for further education (e.g. university, vocational, technical school) b. To develop skills for work c. To be active citizens and community members d. To understand oneself and develop social skills or values e. Additional (please specify) f. Don't know/Prefer not to answer 	<p>3.2 What do you think your child's teachers believe is the most important purpose of school? [select top one]</p> <ul style="list-style-type: none"> a. To prepare for further education (e.g. university, vocational, technical school) b. To develop skills for work c. To be active citizens and community members d. To understand oneself and develop social skills or values e. Additional (please specify) f. Don't know/Prefer not to answer 	<p>3.2 What do you think your students' parents believe is the most important purpose of school? [select top one]</p> <ul style="list-style-type: none"> a. To prepare for further education (e.g. university, vocational, technical school) b. To develop skills for work c. To be active citizens and community members d. To understand oneself and develop social skills or values e. Additional (please specify) f. Don't know/Prefer not to answer

Student Survey	Family Survey	Educator Survey
Beliefs on Education (continued) <i>Notes: If you are administering the survey to the whole school population, consider asking families to think about the oldest child when answering the survey, as they may have multiple children in the school. How families answer questions may vary by child's age. Randomize the response options for questions 3-5.</i>		
<p>3.3 What do you think your parents believe is the most important purpose of school? [select top one]</p> <ul style="list-style-type: none"> a. To prepare for further education (e.g. university, vocational, technical school) b. To develop skills for work c. To be active citizens and community members d. To understand oneself and develop social skills or values e. Additional (please specify) f. Don't know/Prefer not to answer 		
<p>4. When are you most satisfied with your education? When you are... [select top one]</p> <ul style="list-style-type: none"> a. Gaining skills to understand yourself, developing social skills or values b. Participating in community service/learning c. Gaining skills for work d. Getting good marks in your subjects/exams e. Additional (please specify) f. Don't know/Prefer not to answer 	<p>4. When are you most satisfied with your child's education? When your child is... [select top one]</p> <ul style="list-style-type: none"> a. Gaining skills to understand themselves, developing social skills or values b. Participating in community service/learning c. Gaining skills for work d. Getting good marks in your subjects/exams e. Additional (please specify) f. Don't know/Prefer not to answer 	<p>4. When are you most satisfied with your students' education? When your students are... [select top one]</p> <ul style="list-style-type: none"> a. Gaining skills to understand themselves, developing social skills or values b. Participating in community service/learning c. Gaining skills for work d. Getting good marks in your subjects/exams e. Additional (please specify) f. Don't know/Prefer not to answer
<p>5. You are visiting different classrooms to choose the school you want to attend. Which teaching and learning practices are most important in your choice? [select top one]</p> <ul style="list-style-type: none"> a. Teacher leads all instruction b. Student participation is central to learning c. Experiences and projects are central to learning d. Technology is central to learning e. Home cultures and languages are central to learning f. Play is central to learning g. Additional (please specify) h. Don't know/Prefer not to answer 	<p>5. You are visiting different classrooms to choose the school where you want your child to study. Which teaching and learning practices are most important in your choice? [select top one]</p> <ul style="list-style-type: none"> a. Teacher leads all instruction b. Student participation is central to learning c. Experiences and projects are central to learning d. Technology is central to learning e. Home cultures and languages are central to learning f. Play is central to learning g. Additional (please specify) h. Don't know/Prefer not to answer 	<p>5. You are visiting different classrooms to choose the school where you will teach/work. Which teaching and learning practices are most important in your choice? [select top one]</p> <ul style="list-style-type: none"> a. Teacher leads all instruction b. Student participation is central to learning c. Experiences and projects are central to learning d. Technology is central to learning e. Home cultures and languages are central to learning f. Play is central to learning g. Additional (please specify) h. Don't know/Prefer not to answer

Student Survey	Family Survey	Educator Survey
Relational Trust		
I am going to make a few statements. Tell me to what extent you agree or disagree with these statements.	I am going to make a few statements. Tell me to what extent you agree or disagree with these statements.	I am going to make a few statements. Tell me to what extent you agree or disagree with these statements.
<p>6. My teachers share my beliefs about what makes a good education. [select one]</p> <p>a. Strongly disagree b. Disagree c. Agree d. Strongly agree e. Don't know/Prefer not to answer</p>	<p>6. My child's teachers share my beliefs about what makes a good education. [select one]</p> <p>a. Strongly disagree b. Disagree c. Agree d. Strongly agree e. Don't know/Prefer not to answer</p>	<p>6. My students' parents share my beliefs about what makes a good education. [select one]</p> <p>a. Strongly disagree b. Disagree c. Agree d. Strongly agree e. Don't know/Prefer not to answer</p>
<p>7. My teachers seek and value my input and suggestions. [select one]</p> <p>a. Strongly disagree b. Disagree c. Agree d. Strongly agree e. Don't know/Prefer not to answer</p>	<p>7. My child's teachers seek and value my input and suggestions. [select one]</p> <p>a. Strongly disagree b. Disagree c. Agree d. Strongly agree e. Don't know/Prefer not to answer</p>	<p>7. My students' parents seek and value my input and suggestions. [select one]</p> <p>a. Strongly disagree b. Disagree c. Agree d. Strongly agree e. Don't know/Prefer not to answer</p>
<p>8. My teachers respect me. [select one]</p> <p>a. Strongly disagree b. Disagree c. Agree d. Strongly agree e. Don't know/Prefer not to answer</p>	<p>8. My child's teachers respect me. [select one]</p> <p>a. Strongly disagree b. Disagree c. Agree d. Strongly agree e. Don't know/Prefer not to answer</p>	<p>8. My students' parents respect me. [select one]</p> <p>a. Strongly disagree b. Disagree c. Agree d. Strongly agree e. Don't know/Prefer not to answer</p>

Student Survey	Family Survey	Educator Survey
Relational Trust (continued)		
<p>9. My teachers keep the commitments or promises they make. [select one]</p> <p>a. Strongly disagree b. Disagree c. Agree d. Strongly agree e. Don't know/Prefer not to answer</p>	<p>9. My child's teachers keep the commitments or promises they make. [select one]</p> <p>a. Strongly disagree b. Disagree c. Agree d. Strongly agree e. Don't know/Prefer not to answer</p>	<p>9. My students' parents keep the commitments or promises they make. [select one]</p> <p>a. Strongly disagree b. Disagree c. Agree d. Strongly agree e. Don't know/Prefer not to answer</p>
<p>10. My teachers care about me and my family. [select one]</p> <p>a. Strongly disagree b. Disagree c. Agree d. Strongly agree e. Don't know/Prefer not to answer</p>	<p>10. My child's teachers care about my child and our family. [select one]</p> <p>a. Strongly disagree b. Disagree c. Agree d. Strongly agree e. Don't know/Prefer not to answer</p>	<p>10. My students' parents care about me. [select one]</p> <p>a. Strongly disagree b. Disagree c. Agree d. Strongly agree e. Don't know/Prefer not to answer</p>
<p>11. I am satisfied with the teaching and learning at my school. [select one]</p> <p>a. Strongly disagree b. Disagree c. Agree d. Strongly agree e. Don't know/Prefer not to answer</p>	<p>11. I am satisfied with the teaching and learning at my child's school. [select one]</p> <p>a. Strongly disagree b. Disagree c. Agree d. Strongly agree e. Don't know/Prefer not to answer</p>	<p>11. I am satisfied with how my students' families are supporting their teaching and learning at home. [select one]</p> <p>a. Strongly disagree b. Disagree c. Agree d. Strongly agree e. Don't know/Prefer not to answer</p>
<p>12. I am very involved in my school. [select one]</p> <p>a. Strongly disagree b. Disagree c. Agree d. Strongly agree e. Don't know/Prefer not to answer</p>	<p>12. I am very involved in my child's school. [select one]</p> <p>a. Strongly disagree b. Disagree c. Agree d. Strongly agree e. Don't know/Prefer not to answer</p>	<p>12. My students' parents are very involved in our school. [select one]</p> <p>a. Strongly disagree b. Disagree c. Agree d. Strongly agree e. Don't know/Prefer not to answer</p>

Student Survey	Family Survey	Educator Survey
Types of and Barriers to Involvement		
<p>13. How are your parents involved in your learning or school? [select all that apply]</p> <ul style="list-style-type: none"> a. Not involved b. Supporting or monitoring student learning c. Communicating with teachers & school staff d. Following school news e. Donations (financial) f. Attending school events g. Volunteering in school activities h. Providing feedback on school decisions (e.g. policies) i. Leadership in a parent association j. Additional (please specify) k. Don't know/Prefer not to answer 	<p>13. How are you involved in your child's learning or school? [select all that apply]</p> <ul style="list-style-type: none"> a. Not involved b. Supporting or monitoring student learning c. Communicating with teachers & school staff d. Following school news e. Donations (financial) f. Attending school events g. Volunteering in school activities h. Providing feedback on school decisions (e.g. policies) i. Leadership in a parent association j. Additional (please specify) k. Don't know/Prefer not to answer 	<p>13. How are your students' parents involved in their child's learning or school? [select top three]</p> <ul style="list-style-type: none"> a. Not involved b. Supporting or monitoring student learning c. Communicating with teachers & school staff d. Following school news e. Donations (financial) f. Attending school events g. Volunteering in school activities h. Providing feedback on school decisions (e.g. policies) i. Leadership in a parent association j. Additional (please specify) k. Don't know/Prefer not to answer
<p>14. What are some challenges your family has in being involved in your learning or school? [select all that apply]</p> <ul style="list-style-type: none"> a. Lack of time b. Financial constraints c. Transportation d. Lack of technology e. Insufficient communication f. Lack of opportunities for involvement g. Lack of interest h. Literacy, language, cultural barriers i. Not welcoming or unsafe environment j. Health, well-being, or disability k. No challenges l. Additional (please specify) m. Don't know/Prefer not to answer 	<p>14. What are some challenges you have in being involved in your child's learning or school? [select all that apply]</p> <ul style="list-style-type: none"> a. Lack of time b. Financial constraints c. Transportation d. Lack of technology e. Insufficient communication f. Lack of opportunities for involvement g. Lack of interest h. Literacy, language, cultural barriers i. Not welcoming or unsafe environment j. Health, well-being, or disability k. No challenges l. Additional (please specify) m. Don't know/Prefer not to answer 	<p>14. What are some challenges parents have in being involved in their child's learning or school? [select top three]</p> <ul style="list-style-type: none"> a. Lack of time b. Financial constraints c. Transportation d. Lack of technology e. Insufficient communication f. Lack of opportunities for involvement g. Lack of interest h. Literacy, language, cultural barriers i. Not welcoming or unsafe environment j. Health, well-being, or disability k. No challenges l. Additional (please specify) m. Don't know/Prefer not to answer

Student Survey	Family Survey	Educator Survey
Communication		
<p>15.1 How do you communicate with your teacher about your personal progress? [select all that apply]</p> <ul style="list-style-type: none"> a. I don't communicate with them b. Written note c. Email or newsletter d. Text message (i.e. SMS) e. Social media platform (i.e. WhatsApp or chat, Instagram) f. Telephone call g. In-person meeting h. Additional (please specify) i. Don't know/Prefer not to answer 	<p>15.1 How do you communicate with your child's teachers about their personal progress? [select all that apply]</p> <ul style="list-style-type: none"> a. I don't communicate with them b. Written note c. Email or newsletter d. Text message (i.e. SMS) e. Social media platform (i.e. WhatsApp or chat, Instagram) f. Telephone call g. In-person meeting h. Additional (please specify) i. Don't know/Prefer not to answer 	<p>15.1 How do you communicate with your students' parents about their personal progress? [select all that apply]</p> <ul style="list-style-type: none"> a. I don't communicate with them b. Written note c. Email or newsletter d. Text message (i.e. SMS) e. Social media platform (i.e. WhatsApp or chat, Instagram) f. Telephone call g. In-person meeting h. Additional (please specify) i. Don't know/Prefer not to answer
<p>15.2 How do you receive general information from your school? [select all that apply]</p> <ul style="list-style-type: none"> a. I don't receive school information b. Written note c. Email or newsletter d. Text message (i.e. SMS) e. Social media platform (i.e. WhatsApp or chat, Instagram) f. Telephone call g. In-person meeting h. Additional (please specify) i. Don't know/Prefer not to answer 	<p>15.2 How do you receive general information from your child's school? [select all that apply]</p> <ul style="list-style-type: none"> a. I don't receive school information b. Written note c. Email or newsletter d. Text message (i.e. SMS) e. Social media platform (i.e. WhatsApp or chat, Instagram) f. Telephone call g. In-person meeting h. Additional (please specify) i. Don't know/Prefer not to answer 	

Student Survey	Family Survey	Educator Survey
Individual Demographics <i>Notes: Adjust the demographic questions to your context, but make sure to include questions that allow beliefs, experiences, and perspectives to be analyzed across different groups.</i>		
<p>16. For your parent(s) with the highest level of education, what level did they attain? [select one]</p> <ul style="list-style-type: none"> a. Did not attend school b. Less than a secondary school diploma c. Secondary school diploma or equivalency d. Some college e. College/University Diploma or Degree (e.g. university, technical college) f. Graduate (e.g., master's degree, professional degree) g. Additional (please specify) h. Don't know/Prefer not to answer 	<p>16. What is your highest level of education attained? [select one]</p> <ul style="list-style-type: none"> a. Did not attend school b. Less than a secondary school diploma c. Secondary school diploma or equivalency d. Some college e. College/University Diploma or Degree (e.g. university, technical college) f. Graduate (e.g., master's degree, professional degree) g. Additional (please specify) h. Don't know/Prefer not to answer 	<p>16. What is your highest level of education attained? [select one]</p> <ul style="list-style-type: none"> a. Did not attend school b. Less than a secondary school diploma c. Secondary school diploma or equivalency d. Some college e. College/University Diploma or Degree (e.g. university, technical college) f. Graduate (e.g., master's degree, professional degree) g. Additional (please specify) h. Don't know/Prefer not to answer
<p>17. What is your primary language spoken at home? [select all that apply]</p> <ul style="list-style-type: none"> a. [create options by country] b. Additional (please specify) c. Don't know/Prefer not to answer 	<p>17. What is your primary language spoken at home? [select all that apply]</p> <ul style="list-style-type: none"> a. [create options by country] b. Additional (please specify) c. Don't know/Prefer not to answer 	<p>17. What is your primary language spoken at home? [select all that apply]</p> <ul style="list-style-type: none"> a. [create options by country] b. Additional (please specify) c. Don't know/Prefer not to answer
<p>18. On most days, how often is your household able to cover basic food and living expenses? [select one]</p> <ul style="list-style-type: none"> a. Never b. Sometimes c. Mostly d. Always e. Don't know/Prefer not to answer 	<p>18. On most days, how often is your household able to cover basic food and living expenses? [select one]</p> <ul style="list-style-type: none"> a. Never b. Sometimes c. Mostly d. Always e. Don't know/Prefer not to answer 	<p>18. On most days, how often is your household able to cover basic food and living expenses? [select one]</p> <ul style="list-style-type: none"> a. Never b. Sometimes c. Mostly d. Always e. Don't know/Prefer not to answer

Student Survey	Family Survey	Educator Survey
Individual Demographics (continued) <i>Notes: Adjust the demographic questions to your context, but make sure to include questions that allow beliefs, experiences, and perspectives to be analyzed across different groups.</i>		
19. Your school is which of the following? [select one] a. Public (government) school b. Private school c. Community school d. Nonformal learning institution e. Religious school f. Charter school (US only) g. Additional (please specify) h. Don't know/Prefer not to answer	19. Your child's school is which of the following? [select one] a. Public (government) school b. Private school c. Community school d. Nonformal learning institution e. Religious school f. Charter school (US only) g. Additional (please specify) h. Don't know/Prefer not to answer	19. Your school is which of the following? [select one] a. Public (government) school b. Private school c. Community school d. Nonformal learning institution e. Religious school f. Charter school (US only) g. Additional (please specify) h. Don't know/Prefer not to answer
20. What gender do you identify with? [select one] a. Female b. Male c. Non-binary d. Identity not named (please specify) e. Prefer not to answer	20. What gender do you identify with? [select one] a. Female b. Male c. Non-binary d. Identity not named (please specify) e. Prefer not to answer	20. What gender do you identify with? [select one] a. Female b. Male c. Non-binary d. Identity not named (please specify) e. Prefer not to answer
21. Do you have a disability? [select one] a. Yes b. No c. Don't know/Prefer not to answer	21. Does your child enrolled in this school have a disability? [select one] a. Yes b. No c. Don't know/Prefer not to answer	
		21. What is your position at your school? [select all that apply] a. Teacher b. Assistant Teacher /Paraprofessional c. Teaching specialist d. Special/Inclusive education specialist e. Principal/Head Teacher f. Education leader (district or central level) g. Additional staff h. Additional (please specify)

Thank you for your time. The survey has come to an end [add information on how they will receive final data].

Optional questions to be added when administering the survey multiple times or with out-of-school youth

<p>Have you taken this survey before?</p> <p>a. Yes</p> <p>b. No</p>	<p>Have you taken this survey before?</p> <p>a. Yes</p> <p>b. No</p>	<p>Have you taken this survey before?</p> <p>a. Yes</p> <p>b. No</p>
<p>Are you currently in school?</p> <p>a. Yes</p> <p>b. No</p>		
<p>If not, when was the last time you were in school?</p> <p>a. [List years]</p>		

Tool 3: Field Testing Checklist

About

The Field Testing Checklist leads CST teams through the piloting and testing of the survey tools with a small group of participants before they are administered to the larger sample.

Purpose of Field Tests

Field testing helps ensure survey questions and responses are clear and understandable (appropriate language/literacy level), relevant (accounting for age, gender, other demographics), textually appropriate (culturally responsive), and accurate (consistent).

Guidance

The Field Testing Checklist is divided into two sections: a) planning, and b) conducting the field testing. Detailed decisions and action items are outlined as well as considerations to think about when field testing.

Questions	Decision/Actions	Considerations
Planning		
1. Who will you include in the field testing? How will you structure the field testing conversations?	<ul style="list-style-type: none"> <input type="checkbox"/> Identify 6-8 participants from each participant group (families, educators, and students) to review your respective surveys (i.e., 6-8 families, 6-8 educators). <input type="checkbox"/> Determine whether you will meet one-on-one or in small groups. <input type="checkbox"/> Identify a convenient time and private place for field testing. <input type="checkbox"/> Determine whether you will meet in-person or virtually. 	<ul style="list-style-type: none"> • <i>Identify participants who will not be part of your actual sample but who are similar demographic to your sample (e.g., teach similar grade levels, have similar education levels, etc.).</i> • <i>Conversations may last between 45 and 60 minutes.</i> • <i>In contexts where the survey will be conducted orally (e.g., over the phone, in-person) with families of different education and literacy levels, make sure at least half of the family participants have low literacy and the other half have moderate literacy. For surveys where participants answer on their own (e.g., survey link), ensure all participants can read at the surveys' minimum reading proficiency level (i.e., as determined by Flesch Reading Ease/ Flesch-Kincaid; see Williamson & Martin, 2010).</i>
2. How will you prepare for field testing?	<ul style="list-style-type: none"> <input type="checkbox"/> Carefully review the surveys and the field testing considerations. Orient facilitator(s) leading the process. <input type="checkbox"/> Create a paper/electronic copy of the survey comments to take notes. 	<ul style="list-style-type: none"> • <i>Try to employ the same facilitators across participant groups for consistency (i.e., same facilitator that leads field testing with families and educators).</i> • <i>Depending on the cultural and social context, grouping participants by demographics can help make them more comfortable in responding to guiding questions (e.g., single gender groups).</i>

Questions	Decision/Actions	Considerations
Conducting field testing		
3. How do you introduce field testing to participants?	<input type="checkbox"/> Explain that the purpose of field testing is to ensure questions are clear and understandable—and not to record the participants' actual answers. <input type="checkbox"/> Ask for the participants' verbal consent and make it clear that participation is voluntary and they can stop at any time.	<p><i>Suggested consent language: "We are conducting a survey to learn about different beliefs about education and family-school collaboration. Your participation is voluntary and your information will be treated confidentially. We will not ask your name or other personal information. You can choose to answer or not answer any questions and you are free to withdraw from further participation at any time. Do you agree to participate? (Yes/No)"</i></p>
4. How will you gauge the clarity and comprehension of the directions, questions, and responses? How will you gauge comfortability with the questions?	<input type="checkbox"/> Read the directions of the survey to the participants. Ask about clarity: "Were the directions clear? Can you summarize them in your own words?" <input type="checkbox"/> Read each question and response choice to the participants. After each question, ask about comprehension and relevance: "Are the question and the corresponding responses easy to understand? Can you restate the questions in your own words? Was there any language that was unclear or any words that were confusing? Is this a question you think others can easily answer?" <input type="checkbox"/> Ask participants to identify any questions or responses that made them uncomfortable to answer: "Was there any language that made you uncomfortable or that did not seem appropriate?"	<ul style="list-style-type: none"> • Take detailed notes on participants' feedback on the instructions, questions, and response choices. Be sure to record any questions, words, or concepts that are difficult to understand. • The surveyor should remind participants that they are not actually recording demographics, just reviewing the questions. If questions elicit discomfort, the surveyor should tactfully probe how to make the language more comfortable.
5. How do we finalize the surveys based on participant feedback?	<input type="checkbox"/> After reviewing the surveys with all field test participants, make proposed changes to the surveys in line with the suggestions of the participants. <input type="checkbox"/> Discuss all proposed changes as a CST team and decide on the final wording of the surveys.	<ul style="list-style-type: none"> • If multiple participants suggest the same changes to wording/phrasing, make note. As time permits, the facilitator can begin to pilot new words or different phrasing that could increase clarity and comfort if they get multiple participants expressing confusion or discomfort. If there are considerable changes, consider a follow-up pilot after changes have been made.

Tool 4: Analysis Checklist and Survey Data Snapshot

About

The Analysis Checklist leads teams through how they should prep and clean, analyze, and present the survey data that has been collected. The Survey Data Snapshot is an example of how CST teams can present the survey demographics and findings in an easy-to-understand format that can be shared with families, educators, and students to prompt their discussions.

Guidance

The Analysis Checklist is divided into three sections: a) prepping and cleaning, b) analyzing, and c) visualizing. Detailed decisions, actions, and considerations for analyzing each section of the surveys are provided (demographics, beliefs, relational trust, and types of and barriers to involvement). Promising practices for visualizing data for schools and communities are detailed, alongside an example of a Survey Data Snapshot.

Questions	Considerations
Prepping and cleaning survey data	
1. How are survey responses recorded?	
<input type="checkbox"/> If using paper survey , input all responses into an electronic format. <input type="checkbox"/> Enter in-person or phone survey responses directly into the electronic survey.	<i>Use a secure electronic survey format (i.e. Kobo Toolbox, Qualtrics, Survey Hero, Survey Monkey, etc.). Enter any paper response data carefully and methodically. There is a codebook for survey questions in the Technical Report.</i>
2. What format should be used to export data from the survey platform?	
<input type="checkbox"/> Export data from the survey platform to an Excel CSV file or whichever format you will use to clean and analyze data (i.e., STATA, SPSS, etc.).	<i>Export responses in numeric values for relevant questions. Manually assign values to the survey platform as needed (i.e., coding 1 as "Yes"). Match the codebook to the actual values.</i>
3. How is the survey data prepped and cleaned?	
<input type="checkbox"/> Delete any columns in the data file that contain identifying, extraneous, or empty data (i.e., participant IP address). <input type="checkbox"/> Rename your column variable names as needed. <input type="checkbox"/> Code missing data as "-99" to ensure no empty cells. <input type="checkbox"/> Code "other" responses using a clear rationale.	<i>Save the raw data file separately before altering data in the working file. Empty cells will be problematic for importing into the analysis software. If 5-10% of responses are "Additional", 1) recode responses that fit into one of the existing answer choices, or 2) leave data as "Additional" when the response does not clearly fit options.</i>
Analyzing the survey data	
4. How are the demographic questions analyzed?	
<input type="checkbox"/> Calculate percentages (frequencies) of responses for each demographic question/variable. <input type="checkbox"/> Identify demographic variables that have sufficient variance between the categories (i.e., categories of male and female for the gender variable).	<p><i>Demographic variables include gender, level of education/n, race/ethnicity, student's disability status, grade of student, socioeconomic status, language spoken at home, region/district/school variable, type of school, etc.</i></p> <p><i>What counts as sufficient variance within each demographic variable will depend on the sample size and number of response categories, among other factors. However, there should be enough cases (i.e., 30 or more) in two or more of the categories to calculate percentages by the different categories (i.e. at least 30 male students and 30 female students to compare beliefs on the purpose of school by gender).</i></p>
5. How are the beliefs on education questions (single-choice) analyzed?	
<input type="checkbox"/> Calculate percentages (frequencies) of responses for each single-choice question by the total population. <input type="checkbox"/> Calculate percentages (frequencies) of responses for each single-choice question by demographic variables. If there is enough variance between the categories, run cross tabs for each belief question by each demographic variable.	<p>Beliefs on Education: Questions 3.1, 3.2, 4, and 5 (single choice).</p>

Questions	Considerations
6. How are the types of and barriers to involvement questions (multiple choice) analyzed?	
<ul style="list-style-type: none"> <input type="checkbox"/> Calculate the percentages (frequencies) of each multiple-choice question by the total population. <input type="checkbox"/> Calculate the percentages (frequencies) of each multiple-choice question by demographic variables. If there is enough variance between the categories, run cross tabs for each multiple-choice question by each demographic variable. 	<i>Types of and Barriers to Involvement: Questions 13 and 14 (multiple choice).</i>
7. How are the relational trust questions (Likert questions) analyzed?	
<ul style="list-style-type: none"> <input type="checkbox"/> Calculate the mean for each of the 7 relational trust questions by participant group. <input type="checkbox"/> Calculate the mean of the means (the scale) across the 7 questions by participant group. Exclude from the total population any individuals that have not responded to all 7 of the relational trust question. 	<i>Relational Trust Scale: Questions 6,7,8,9,10,11, and 12 (Likert questions).</i>
Visualizing the survey data	
8. How should data be visualized for schools and communities?	
<ul style="list-style-type: none"> <input type="checkbox"/> Create figures with the key demographic data by each participant group (families, educators, and students). <input type="checkbox"/> Create figures with the beliefs on education (purpose, satisfaction, pedagogy) data by each participant group. <input type="checkbox"/> Visualize the types of and barriers to involvement by each participant group. <input type="checkbox"/> Visualize the relational trust scale by each participant group. 	<p>See the Survey Data Snapshot below for an example of how to present data in an easy-to-read format.</p> <ul style="list-style-type: none"> • Visual #1: A table of participant demographic data (gender, race/ethnicity, socioeconomic status, education level, student age, etc.). • Visual #2: Belief maps that compare perceptions on the purpose of school by participant groups. • Visual #3: Pictorial images that show the different perceptions on other's beliefs. • Visual #4: Belief maps that compare satisfaction with school by participant groups. • Visual #5: Bar charts that compare preferred pedagogy by participant groups. • Visual #6: Bar charts that compare types of family involvement by participant groups. The top three choices should be indicated by each participant group. • Visual #7: Bar charts that compare barriers to family involvement by participant groups. The top three choices should be indicated by each participant group. • Visual #8: Bar charts that compare the relational trust scale score (mean value between 1 to 4) by participant groups.


















Survey Data Snapshot

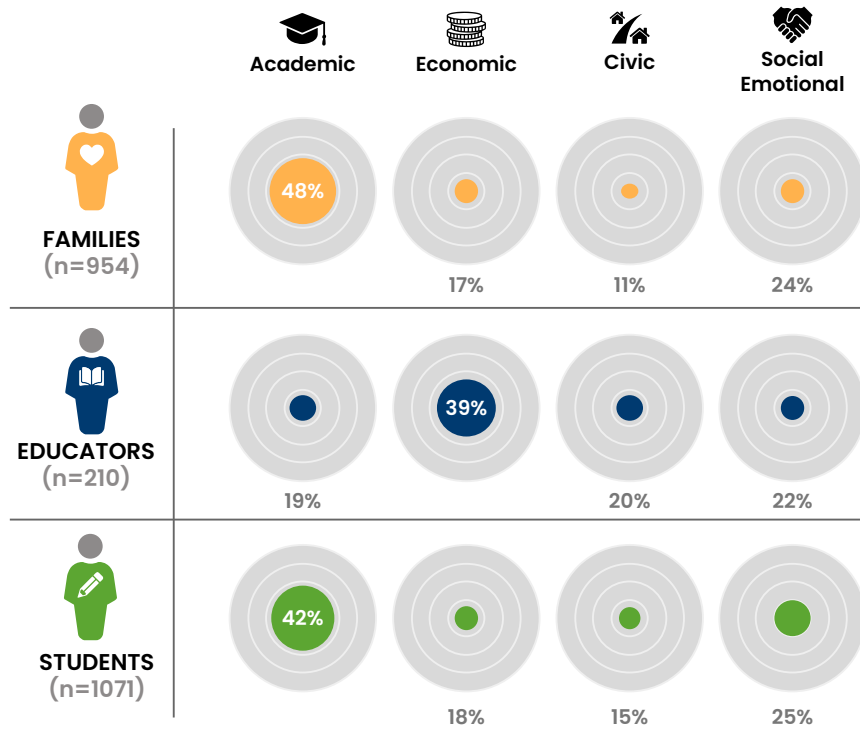
Guidance

The Survey Data Snapshot includes eight simple visuals with corresponding survey data. A customizable PowerPoint with the figures and images can be found on the CUE website so teams can create their own Survey Data Snapshots with their data.

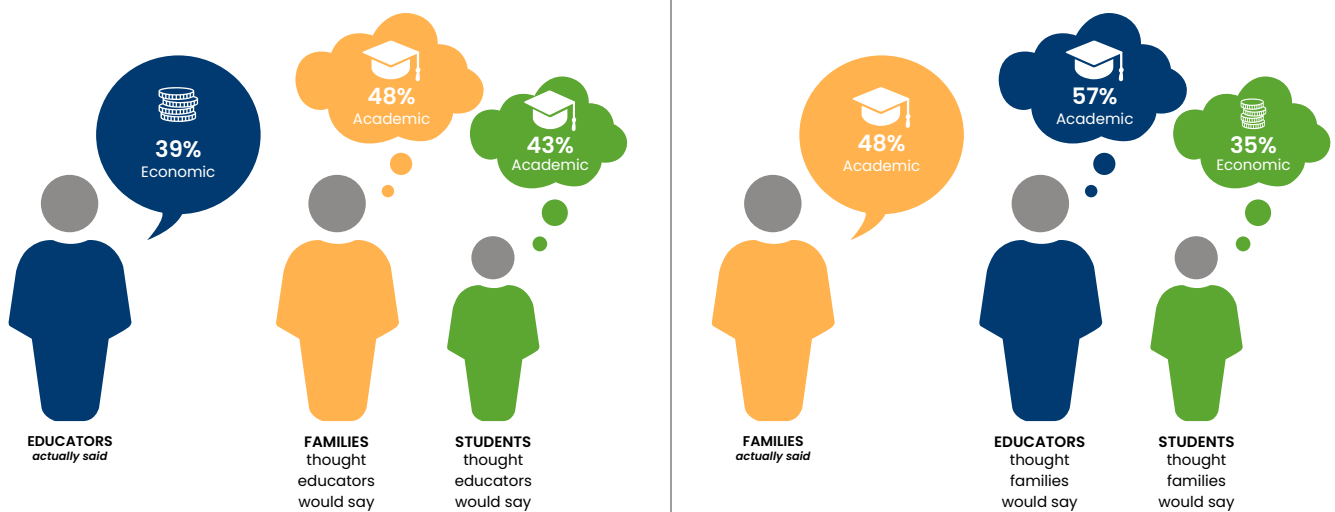
Visual #1: Participant demographics

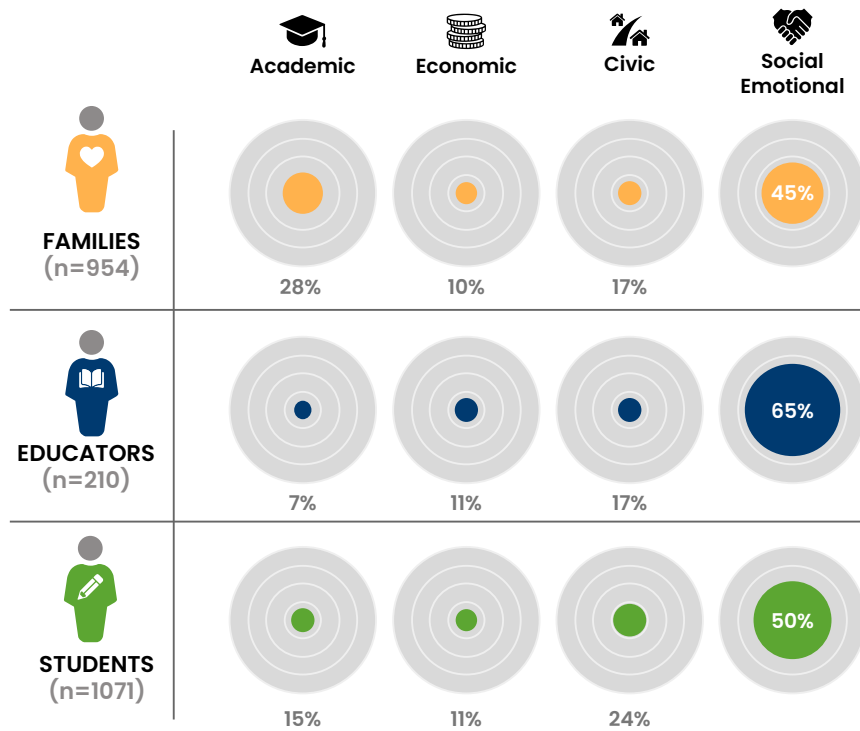
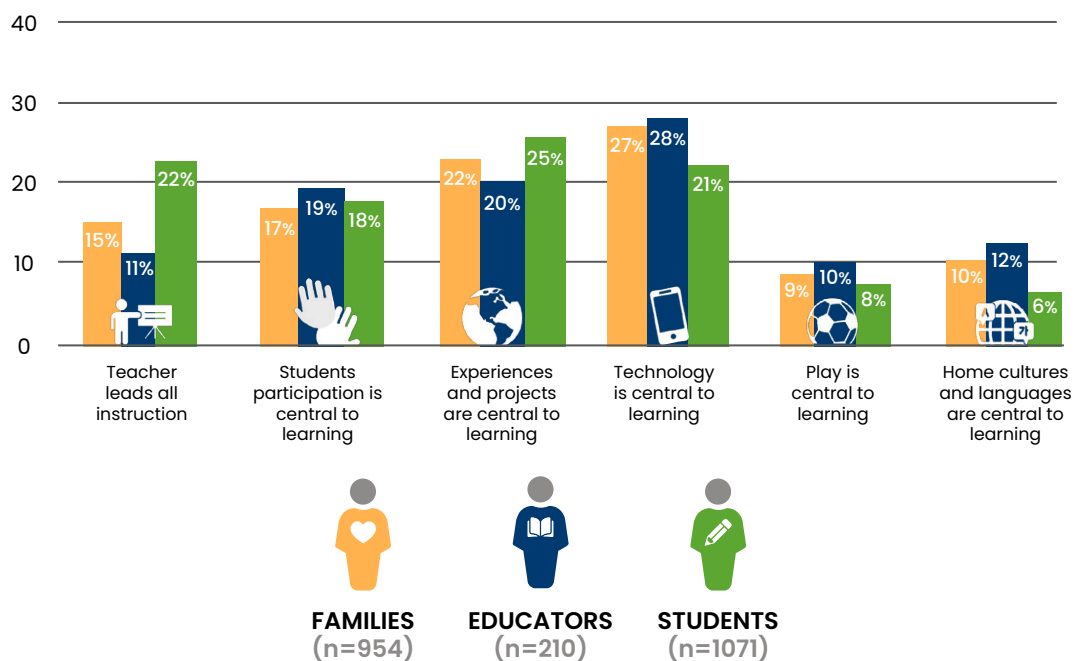
954 FAMILIES 			210 EDUCATORS 			1071 STUDENTS 		
Gender			Gender			Gender		
	Female	54.2%		Female	47.6%		Female	64.1%
	Male	45.8%		Male	52.4%		Male	35.9%
	Other	0%		Other	0%		Other	0%
	Prefer not to answer	0%		Prefer not to answer	0%		Prefer not to answer	0%
Level of Education			Educator Position			Grade		
Primary and Below		45%	Teacher/Teaching Specialist		92%	Grade 1		34%
Secondary		46%	Staff		2%	Grade 2		30%
Post-secondary		9%	Principal		6%	Grade 3		36%
Able to cover basic needs			Able to cover basic needs			Able to cover basic needs		
Never or sometimes		58%				Never or sometimes		47%
Mostly or always		42%				Mostly or always		53%

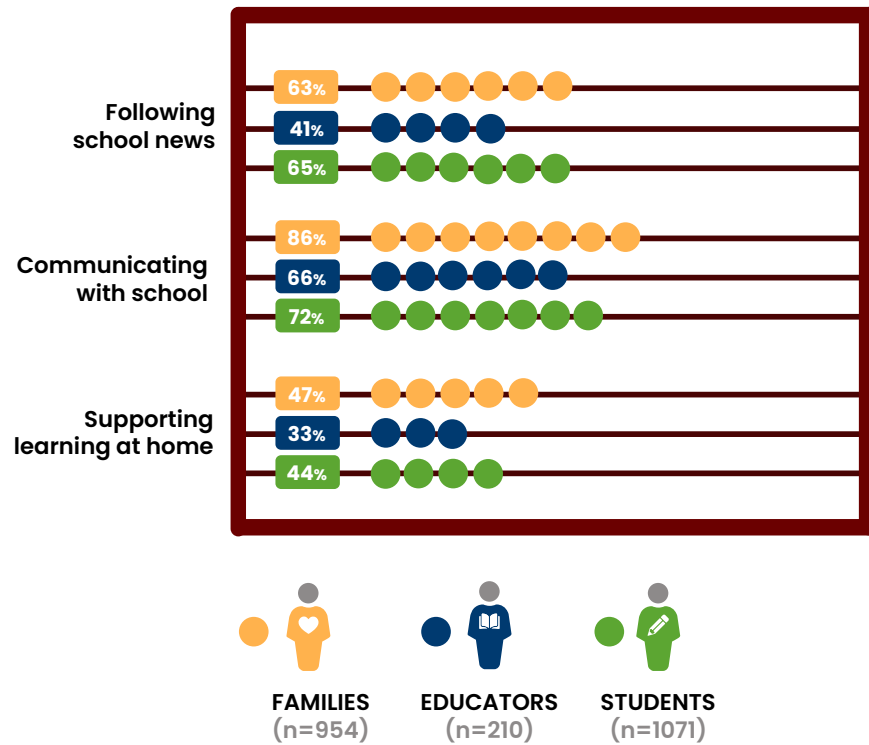
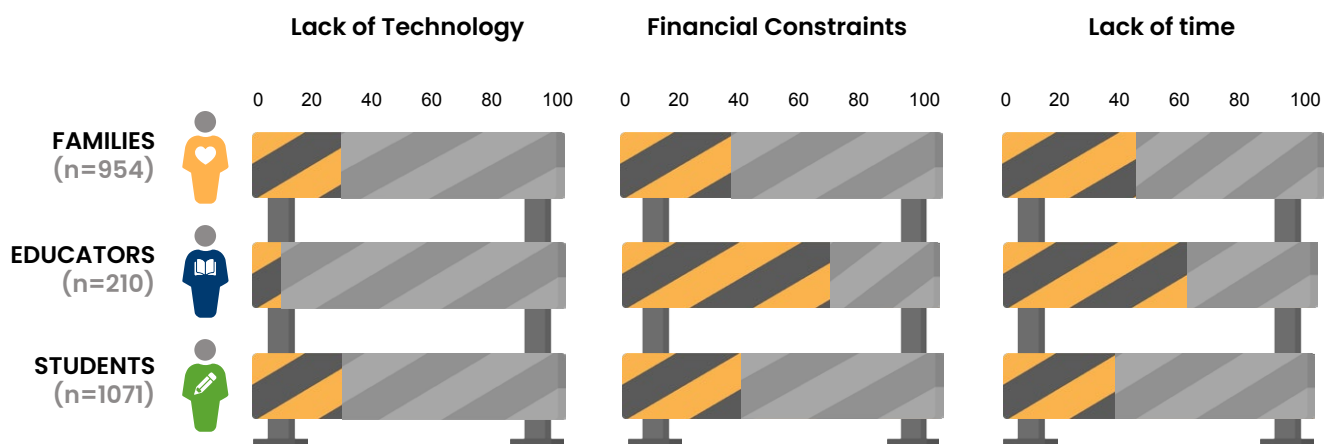
Visual #2: Beliefs on the purpose of school

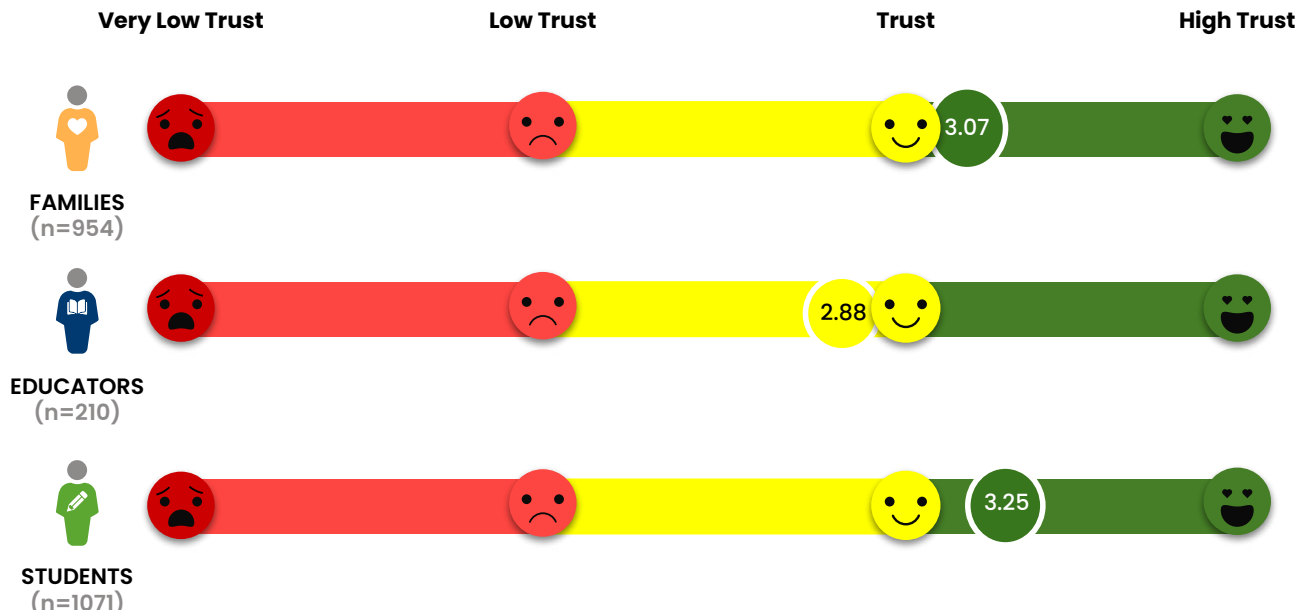


Visual #3: Perceptions of others' beliefs



Visual #4: Satisfaction with education**Visual #5:** Preferred pedagogy (teaching and learning approach)

Visual #6: Top types of family involvement**Visual #7:** Top barriers to family involvement

Visual #8: Relational trust scale (level of trust)



Step 3: Share & Discuss



Tool 5: Conversation Guide

About

The Conversation Guide leads CST teams through suggested steps and tips for planning, facilitating, and documenting conversations with **participants (families, educators, and students) who took part in the surveys.**

Purpose of Conversations

Structured and intentional conversations with survey participants provide valuable time and space to reflect on the diverse beliefs, barriers, and opportunities for engagement collected through the surveys and to build relational trust through active listening and dialogue. Conversations are an important participatory and qualitative research approach, and the dialogues and outcomes of the conversations will be used as data to support the process of developing strategies to further family, school, and community engagement and partnerships as discussed further in the Strategy Guide.

Guidance

This Conversation Guide is divided into three parts. Part One consists of the Conversation Checklist and Facilitation Guidance used to inform the planning of the intentional conversations. Part Two consists of the Conversation Questions used when facilitating the intentional conversations. The illustrative questions should be adapted to each CST team's data and objectives. Part Three consists of the *Global Family, School, and Community Engagement Rubrics Tool*, an optional tool that can be used by school teams to assess and reflect on where they are with engagement and to create a map and vision of where they need to go.

Part One: Planning Intentional Conversations (The Conversation Checklist)

Questions	Decision/Actions	Considerations
Planning		
1. What are your objectives for these conversations?	<i>Describe your team's objectives.</i>	
2. Who will participate in your conversations?	<input type="checkbox"/> Family representatives only (parents/caregivers) <input type="checkbox"/> Educators only <input type="checkbox"/> Mixed families and educators For CST teams surveying students: <input type="checkbox"/> Students only <input type="checkbox"/> Intergenerational groups (parents/families, educators, students or combination) <input type="checkbox"/> Other: _____	<ul style="list-style-type: none"> • <i>Keep groups to 8-12 people. Small groups ensure everyone has an opportunity to respond to several questions.</i> • <i>When including students with adults, ensure students have an active role and an equal opportunity to contribute. If there is not a culture of mixed-group conversations, consider starting with student-only conversations.</i>
3. What demographics should be considered in selecting parent/caregiver and student participants for conversations?	<input type="checkbox"/> Level of engagement in school activities (prioritizing low engagement) <input type="checkbox"/> Gender (e.g., female, male, non-binary) <input type="checkbox"/> Racial and/or ethnic groups <input type="checkbox"/> Primary language spoken <input type="checkbox"/> Languages spoken at home <input type="checkbox"/> Education level or socioeconomic status <input type="checkbox"/> Disabilities <input type="checkbox"/> Others: _____	<ul style="list-style-type: none"> • <i>Make sure to only include people who took the surveys in the conversations.</i> • <i>Include parents/caregivers who are not already engaged in existing activities to understand their perspectives.</i> • <i>Ensure conversations are inclusive of people who identify with different genders, races, ethnicities, disability statuses, and other demographics.</i>
4. What roles and demographics should be considered in selecting educators?	<i>Describe..</i>	<i>Include educators who play different roles in the school (e.g., teachers, guidance counselors) and who represent diverse perspectives and demographics.</i>

Questions	Decision/Actions	Considerations
Facilitating		
5. Who will facilitate the conversation(s)?	<input type="checkbox"/> Family representatives <input type="checkbox"/> Teachers <input type="checkbox"/> Students <input type="checkbox"/> School staff (e.g. family liaison) <input type="checkbox"/> Community group representatives <input type="checkbox"/> Other: _____	<ul style="list-style-type: none"> • Choose a skilled, neutral, dynamic facilitator(s) who is known to the participants and has experience leading conversations with diverse participants. • Avoid having school leaders facilitate conversations given their positions of authority. • In conversations with students, consider having a youth leader facilitate or co-facilitate.
6. How many conversations do you anticipate holding?	<input type="checkbox"/> 1 <input type="checkbox"/> 2 <input type="checkbox"/> 3 <input type="checkbox"/> Other: _____	To build relational trust and to develop implementable strategies, consider holding more than one conversation.
7. How long will the conversation(s) last?	<input type="checkbox"/> 60 minutes <input type="checkbox"/> 75 minutes <input type="checkbox"/> 90 minutes <input type="checkbox"/> 120 minutes <input type="checkbox"/> Other length _____	Plan at least 75-120 minutes to give enough time to hear all participants' viewpoints.
8. Where will you hold the conversations?	<input type="checkbox"/> In-person, at a school <input type="checkbox"/> In-person, outside of the school <input type="checkbox"/> Fully virtual <input type="checkbox"/> Hybrid (mix of virtual and in-person) <input type="checkbox"/> Other: _____	Consider holding conversations in safe, neutral, and quiet spaces outside of the school if that is easier and more comfortable for families.
Documenting and Sharing		
9. How will you document takeaways from the conversations?	<input type="checkbox"/> Detailed notes (no audio) <input type="checkbox"/> Audio recording	<ul style="list-style-type: none"> • If audio recording conversations, inform participants in the verbal consent language. • Ask participants NOT to share their names or personal identifying information (video or still images should not be captured). • Use detailed transcripts when possible for analysis.
10. How will you share data with the whole school community?	<input type="checkbox"/> Physical handout (written) <input type="checkbox"/> Email <input type="checkbox"/> Text <input type="checkbox"/> Video <input type="checkbox"/> Live workshop <input type="checkbox"/> Newsletter, report, or publication <input type="checkbox"/> Other: _____	<ul style="list-style-type: none"> • Share data with the whole school community as an important step in participatory research. • Ensure materials are in appropriate languages and literacy levels.

Facilitation Guidance

During each conversation, participants should have an opportunity to reflect on the survey findings in their school or community and share ideas on why alignment and gaps exist. If something surprises a participant, encourage them to share why. Ideally, by the end of the conversations, participants should try to identify some concrete strategies to increase family, school, and community engagement and partnerships in their communities. Make sure conversations are structured so that there is time to discuss data. If teams need more time to explain data than allotted, schedule more than one meeting or provide additional opportunities to share data with the whole school.

Tips for facilitating effective conversations

- a. Keep the presentation of the survey data brief. The majority of the time should be reserved for conversation. For example, review demographic data at the start and then review each image with the corresponding question.
- b. Restrict conversations to groups of 8 to 12 participants so everyone has a chance to speak. Have 3 to 5 people respond to a question, as opposed to everyone, and alternate which participants respond for each of the questions. Give families and/or students a chance to speak before educators.
- c. Allow enough time for participants to share viewpoints, but keep the conversation moving as needed so multiple viewpoints are heard.
- d. Encourage participants to sit in an arrangement where they can see each other (i.e., a circle).
- e. Ensure that the facilitator has experience facilitating focus group discussions with diverse groups in educational settings. Facilitators should repeat the key points back to the group.
- f. Ensure materials are in languages and literacy levels that all participants can access (use translations and images). Ensure all families feel welcome and that literacy and education levels are not a barrier to participation.
- g. Obtain verbal consent of all participants (if you want to record, verify with all participants ahead of time).

These tips were borrowed from the focus group discussions methodology (Patton, 2014).

Part Two: Facilitating Intentional Conversations (Conversation Questions)

Guidance

The following Conversation Questions are to be adapted based on each team's survey data.

Suggested agenda

An agenda for a 75-minute conversation is outlined below. If holding 90-minute conversations, give participants more time for each question. Make sure to leave time to talk about strategies.

Welcome, introductions, and consent	5 minutes
Brief explanation of the demographic data	5 minutes
Reflection – Question 1 (meaning of family engagement)	~10 minutes
Reflection – Question 2 (beliefs on purpose of school)	~10 minutes
Reflection – Question 3 OR 4 (beliefs on satisfaction OR pedagogy)	~10 minutes
Reflection – Question 5 (types of family involvement)	~10 minutes
Reflection – Question 6 (barriers to family involvement)	~10 minutes
Reflection – Question 7 (identifying strategies)	~10 minutes
Conclusion, takeaways, and thank yous	5 minutes

Documentation guidance

Designate someone who will document the conversations. When taking notes on the conversations, try to capture the main points of the discussion, interesting quotations, differences of opinion, and solutions/strategies to improve family, school, and community engagement and partnerships. Do not write the names of those who are speaking in the notes.

Taking detailed notes enables CST teams to analyze and use conversation data to inform school improvement plans, practices, and policies, and leverage evidence to guide decision-making. Make sure notes and audio recordings are in a password protected and secure place and have no personal identifying information where participants could be tracked by their response. Only a summary of strategies and key information should be shared back with school communities. See the Strategy Guide for ideas on how to share the information with participating schools.

Consent

Start by obtaining the consent from participants and explaining if you will be recording conversations. Without using names, ask each participant to individually state that they agree to participate (yes/no).

"Hello, my name is _____. Thank you for agreeing to participate in this conversation. Your participation will help us understand how families, students, and schools can work together to support student success. Before we begin the conversation, I will review the research process and your rights. After I read this consent statement, I will ask each person to confirm they agree to continue participating in this conversation. If you choose not to participate, there will be no consequences for you or your child; you are free to leave or stop participating at any time. The notes from this conversation will be used for learning purposes only.

[If recording the conversation]: We will use this audio recording to document the conversation, but only *[designated person]* will have access to the audio recording and no names will be used. All data files will be password-protected. *[If not recording the conversation]:* We will be taking notes during this conversation, but only *[designated person]* will have access to them and no names will be used. All data will be kept in password-protected files.

If you have any questions or concerns regarding your participation in this research study or if you have any questions about your rights as a research participant, you may contact *[insert CST team leader]* at *[contact information]*. Do you agree to participate in this conversation?"

Questions

Adapt the following illustrative questions to your CST team's survey data. Accompanying visualizations from the Survey Data Snapshot to use in the conversation are indicated for each question.

Purpose of Question	Question	Accompanying Visual
Definition of family, school, and community engagement	1. What does family, school, and community engagement or partnerships mean to you?	None
Beliefs on the purpose of school	2. Families reported that the most important purpose of school is [enter] as compared to [enter] for educators and [enter] for students. Why do you think families are focused on [enter] as opposed to other purposes? [repeat/adapt question for educators and students]. <i>Probe: How did you decide which purpose of school to choose?</i>	Visual #2
Beliefs on satisfaction with education	3. Families said that they were most satisfied with their student's learning when they were [enter]. Why do you think this is the case? [repeat/adapt question for educators and students]	Visual #4
Beliefs on pedagogy (teaching and learning)	4. Families said that they preferred when teaching and learning was focused on [enter]. What are some examples of [enter], and why do you think this was the top response? [repeat/adapt question for educators and students]	Visual #5
Types of family involvement*	5. In the surveys, families reported [enter] as their main type of involvement as compared to [enter] for educators and [enter] for students. What are some examples of these types of involvement that you have observed/heard about in your school or community?	Visual #6
Barriers to family involvement*	6. In the surveys, families reported [enter] as their main barriers to involvement as compared to [enter] for educators and [enter] for students. What are some examples of these barriers you have observed/heard about in your school or community? <i>Probe (if applicable): Why do you think so many families/educators/students said "no barriers"?</i>	Visual #7
Identifying strategies	7. In the surveys, families reported trust as [enter], while educators reported trust as [enter]. What strategies do you think your school could use to build greater relational trust between families, schools, and communities and to build greater partnerships?	Visual #8

*Note: The term family involvement is used here, as not all examples are examples of engagement or partnership.

Part Three: Furthering Intentional Conversations

Tool 6: Global Family, School, and Community Engagement Rubrics Tool (The Global Rubrics)

About

This [Global Rubrics](#) tool was developed by members of CUE's Global Family Engagement in Education Network and is based on the Family, School, and Community Partnerships preschool through grade 12 (P-K12) Framework Rubrics developed for the Colorado Department of Education in the US by Dr. Darcy Hutchins and Dr. Steven Sheldon. It consists of 12 rubrics organized into four Essential Elements, with three rubrics in each element. Each rubric reflects six evidence-based principles and examples to help school and community teams position their school on one of four levels. It can be used as a standalone tool or as part of the CST process.

Purpose of Conversations

To provide CST teams with a structured approach to assess family, school, and community engagement practices and policies in their communities and to help identify additional strategies to build stronger partnerships with families and communities.

Guidance

Detailed guidance can be found in the *Global Rubrics* tool. Below is a summary of the four Essential Elements and accompanying 12 rubrics.

EE1. Create an Inclusive Culture

1. How are the school's practices inclusive of all families?
2. How is the school learning about families' lived experiences?
3. Who is leading and supporting the creation of a welcoming culture?

EE2. Building Trusting Relationships

4. What do trusting relationships look like in the school community?
5. How is the school ensuring effective use of two-way communication with families to sustain positive relationships?
6. How does the school leverage relationships with families to achieve program/school/district goals?

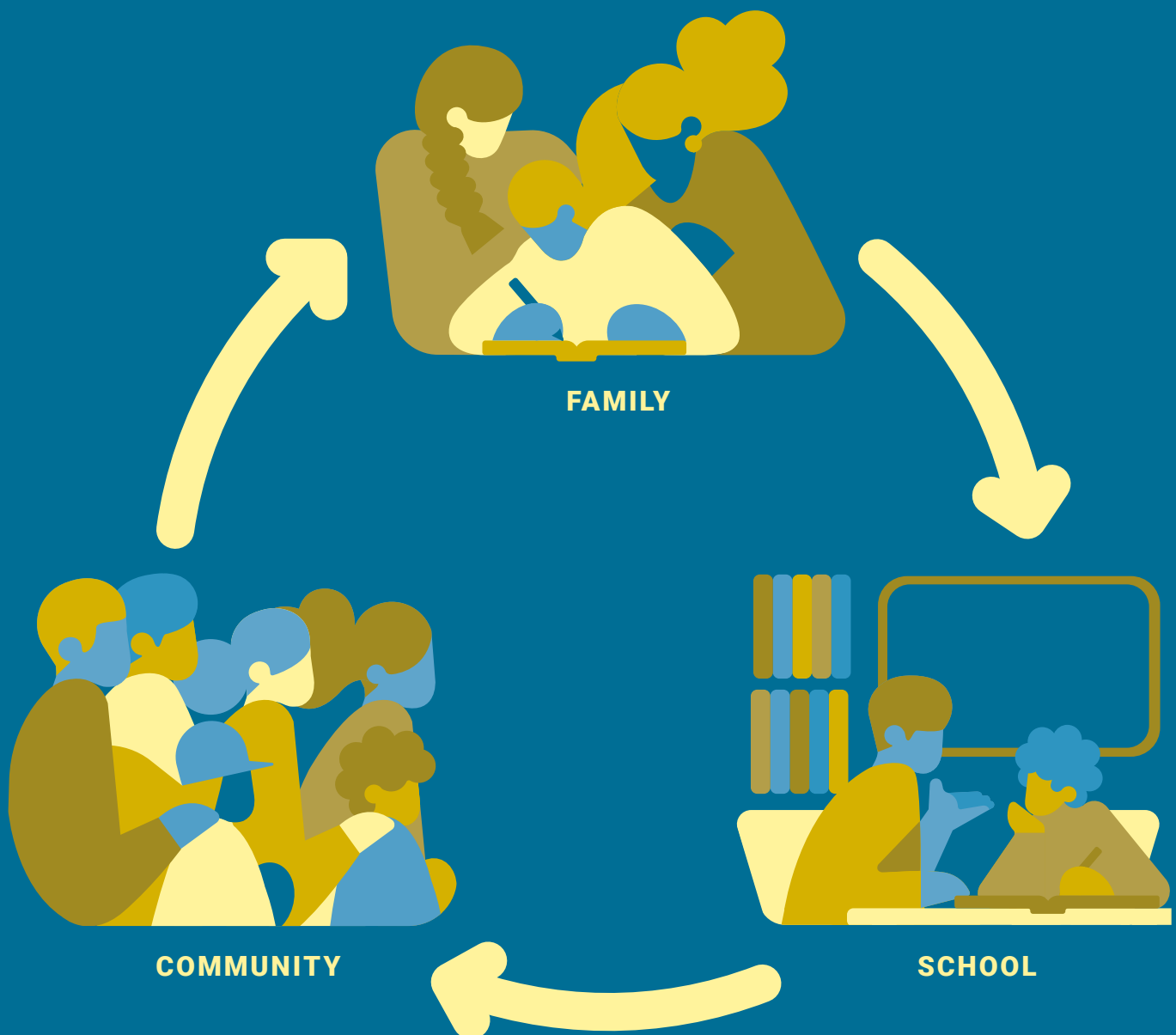
EE3. Leverage Families as Assets

7. How does the school ensure that the teaching, curricula, and instruction are relevant and responsive to diverse family backgrounds and experiences?
8. How is the school involving families in planning and implementing school programs, practices, and policies?
9. How is the school using FSCE as an improvement strategy?

EE4. Sustain Meaningful FSCE Practices

10. How does the school identify and designate human and financial resources to ensure that FSCE is central to the school community?
11. How does the school measure progress toward and set goals for FSCE practices?
12. How does the school ensure that FSCE is a continual commitment and is responsive to a dynamic environment?

Step 4: Strategize



Tool 7: Strategy Guide

About

The final step of the CST process is to develop strategies to improve trust and develop a shared vision between families, schools, and communities to strengthen engagement and partnerships. The Strategy Checklist guides CST teams in using data from surveys and conversations to identify and create implementable strategies for their given community. This guide connects the process of developing strategies to CUE's [Strategy Finder](#), a comprehensive database of examples from around the world.

Purpose of Strategies

The strategies are concrete family, school, and community engagement practices and policies that ultimately promote student learning and development and enable schools to thrive.

Guidance

The Strategy Checklist is divided into three parts: a) identifying the strategies, b) planning for implementation of the strategies, and c) monitoring and evaluating the strategies.

Questions	Considerations
Identifying the strategies	
1. What are the priority strategies?	<p>Create a list of all strategies suggested during the Intentional Conversation and/or the Global Rubrics Tool exercise.</p> <p>Use CUE's Strategy Finder to explore global examples.</p> <p>Discuss proposed strategies with other families and educators of diverse backgrounds and viewpoints and settle on priorities.</p>
2. What are the strategies' objectives (levers of change)?	<p>Example objectives (levers of change) may include:</p> <p>Providing information, Building relationships, Shifting mindsets, Building skills, Providing resources, Designing policies or practices (identifying problems/solutions)</p>
3. Where do the strategies mainly take place?	<p>Identify the places where the strategies occur:</p> <p>Home, School/learning institution, School/education system, Community</p>
4. How are families engaged in the strategies?	<p>Identify the family's role in the strategies:</p> <p>Not engaged, Deciding (families help with main decisions), Supporting (families involved in multiple ways), Creating (Families leading and developing)</p>
5. How does each strategy(s) impact equity and inclusion?	<p>Identify the equity and inclusion implications for each strategy. For example, does the strategy help support greater equity? Could there be possible negative implications?</p>
Planning for implementation of the strategies	
6. What is the timeframe for implementing each strategy?	<p>Identify the number of days (level of effort) and the timeframe for each of the strategies using the planning tool in Appendix A.</p>
7. What human resources are needed to implement each strategy?	<p>Identify the human resources needed to implement each strategy in the planning. Human resources include the people and their time.</p>
8. What financial resources are needed to implement each strategy?	<p>Identify the financial resources needed to implement each strategy. Ensure you have a budget for each strategy.</p>
Monitoring and evaluating the strategies	
9. How will each strategy's progress be tracked and assessed?	<p>For each strategy, determine how you will measure progress and success, how frequently, and other critical information.</p> <p>Share continual progress with your school communities (e.g., conversations and meetings with families, staff meetings, spotlight in newsletter, text message, etc.).</p> <p>Make changes to your strategies to make them even more responsive to your community.</p> <p>Track the activities followed to implement the strategy(s) and the accompanying objectives (see Appendix A for a Strategy Tracking table and examples).</p>

Strategy Finder

About

The [Strategy Finder](#) Tool is a comprehensive global database of strategies to increase family, school, and community engagement that have proven to be effective or meaningful in their given context. Each strategy is linked to the Place (where the strategy mainly occurs), Lever (the strategy's main objective), and Family Role (how families are engaged in the strategy).



Filters

The Strategy Finder database can be searched using the following filters.

- **Country:** Where the strategy was implemented
- **Learner Age:** Early Childhood, Primary, Lower Secondary, or Upper Secondary
- **Technology Level:** No tech, Low tech, and High tech
- **Lever (strategies' objectives):** 1. Providing information, 2. Building relationships, 3. Shifting mindsets, 4. Building skills, 5. Providing resources, 6. Designing policies or practices (identifying problems/solutions).
- **Goal:** 1. Improve students' attendance and completion, 2. Improve students' learning and development, 3. Redefine the purpose of school for students, 4. Redefine the purpose of school for society.

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Appendix: Strategy Planning, Monitoring, and Evaluating

About

The following Strategy Planning, Monitoring, and Evaluating Tool is a guide of the action steps and resources needed to implement each strategy, as well as an assessment of equity and inclusion implications.

Guidance

Complete a Strategy Plan and Tracker for each of the strategies identified. For each strategy, make sure that there are no negative equity and inclusion implications. If there are negative equity and inclusion implications, consider a different strategy and approach. Example goals and objectives from the Playbook that CST teams can adapt are listed below.

Strategy Plan

School or community			Goal*		
Strategy 1:			Objective(s)**		
Action Step	Start and End Dates	Key Personnel	Financial Resources Needed	Equity Implications	Status (not started in progress, completed)

Strategy Tracker

Strategy 1:				Objective(s)**		
Indicators of success (How will the impact be determined?)	Equity Implications (How does this impact equity/inclusion)?	Data Source (Method for measuring impact?)	Frequency (How often monitored?)	Responsible (Who will monitor?)	Sharing (How will progress be shared?)	Considerations (What are some things to consider?)

***Example goals:** 1. Improve students' attendance and completion, 2. Improve students' learning and development, 3. Redefine the purpose of school for students, 4. Redefine the purpose of school for society.

****Example objectives:** 1. Providing information, 2. Building relationships, 3. Shifting mindsets, 4. Building skills, 5. Providing resources, 6. Designing policies or practices (identifying problems/solutions).

Strategy Plan (with example of positive equity and inclusion implications)

School or community: Primary School A			Goal: Improve students' learning and development		
Strategy 1: Poverty empathy simulations for education personnel			Objective(s): Building relationships; Shifting mindsets		
Action Step	Start and End Dates	Key Personnel	Financial Resources Needed	Equity Implications	Status (not started in progress, completed)
Plan simulations with community liaisons	Started in 2020	Lead community liaison	Honoraria or transport for community liaisons	Gives families an opportunity to share experiences with poverty	Complete
Hold staff meeting where families and community liaisons share experiences	Started in 2020	Family-School Coordinator	Time + Refreshments	Some families will need translators to communicate if not fluent in the school's primary languages	In- progress
Discuss what was learned from families' experiences with poverty	Started in 2020	Staff, community liaisons, and families participate in conversation	None (held at staff meeting)	Families' voices are centered	In- progress

Monitoring, Evaluation, and Learning Plan (with example of positive equity and inclusion implications)

Strategy 1: Poverty empathy simulations for education personnel				Objective(s): Building relationships. Shifting mindsets		
Indicators of success	Equity Implications	Data Source	Frequency	Responsible	Sharing	Considerations
Number of participating families and community liaisons	Supports multilingual families	School staff	Simulations 2x a year	Family-School Coordinator	Newsletter	How do we reach diverse families?
Stronger relational trust between families and school staff	Spotlights experiences with poverty	Focus groups	2x a year	Family-School Coordinator	Discussions at staff meetings	How do we sustain trust over time?
Improved sense of belonging of families	Centers families experiencing poverty	Survey on school environment and belonging	1x a year	Principal/ School Director	Sharing with school community	How do we ensure belonging of all families?

Strategy Plan (with example of negative equity and inclusion implications)

School or community: Primary School B			Goal: students' learning and development		
Strategy 1: Create school policy that parent/caregiver attendance at meetings are integrated into student attendance and grades			Objective(s): Designing policy or practice		
Action Step	Start and End Dates	Key Personnel	Financial Resources Needed	Equity Implications	Status (not started in progress, completed)
Create policy on parent/caregiver attendance	Pilot for 2023 school year	Education leader	None (time of personnel)	Students of parents/caregivers who cannot attend because of financial (poverty), disability, or other factors will be penalized	Should we consider a pilot with a small sample and discontinue if there are negative implications for students?
Inform parents/caregivers, teachers, and students about policy	Pilot for 2023 school year	Education leader and school management committee leader	Data for sending SMS messages and printing paper messages	Parents/caregivers who cannot read or do not have a phone may not get the message	How long will it take before the policy is known and practiced?
Enforce policy at all meetings	Pilot for 2023 school year	Education leader	None	Only parents/caregivers who attend will be counted	How do we enforce the policy with children living with elder caregivers or those with disabilities?
Calculate student attendance and grades based on parent/caregiver participation	Pilot for 2023 school year	Teachers	Time of teachers	Students will be negatively impacted if their parents/caregivers cannot participate	How do we ensure that marginalized students are not further penalized?

If there are negative equity and inclusion implications, CST teams should not move forward with the strategy and therefore there is no Monitoring, Evaluation, and Learning Plan example provided.

