



CalSCHLS District Coordinator Planning Worksheet



This worksheet provides new and existing District Coordinators (DCs) with the basic steps necessary to register for and administer the CalSCHLS Surveys for students, staff, and parents/guardians.

Steps for New DCs only:

Step 1

Create an account on the CalSCHLS Coordinator Portal.

This will be your hub for all CalSCHLS activities. Here, you will be able to complete steps 5 and 9. For additional support, please review Section A of our [Guide to CalSCHLS Portal and Survey Registration](#).

Step 2

Schedule your registration consultation.

Your TA will contact you to schedule this meeting so we can answer any questions and help you determine how to best meet your surveying needs.

To prepare for the virtual consultation, please review the rest of this document and mark any questions you may have for us.



By the end of this virtual consultation, you will be able to:

- Determine which surveys and modules you will be administering
- Complete survey registration so you can receive survey URLs
- Know how to move forward with survey distribution, data collection, and receiving results

Steps for Everyone:

Step 1

Determine MOU needs.

Think through considerations like: “Who will sign?” “Is Board approval required?” Please review our [Guide to Submitting Your Memorandum of Understanding](#) for additional support.

Step 2

Determine survey date.

Fall administration opens in early October and closes at the start of winter break. Spring administration begins in early February and closes at the end of the school year.

Step 3

Determine survey modules.

Please refer to our [Guide to Selecting Survey Modules](#) and, in consultation with your TA, determine which of the following modules you’d like to add:

- *[Core Survey Modules](#). Please refer to our [Guide to Selecting Survey Modules](#) for details on core module requirements.*
- *[Required](#). Please refer to our [Guide to Selecting Survey Modules](#) for a listing of modules required for grants (i.e., TUPE) and state accountability measures (i.e., LCAP).*
- *[Custom](#) (optional customized modules to be chosen from a CalSCHLS menu or to be created by you with your own questions). Refer to our [Guide to Custom Modules](#) for additional context.*

Step 4:

Send out Parental Consent.

Please review our [Guide to Obtaining Parental Consent](#).

Step 5

Submit survey registration.

This enables you to start the process of administering your surveys. Please review Section B of our [Guide to CalSCHLS Portal and Survey Registration](#) for additional support.

Step 6

Return signed MOU to your CalSCHLS TA.

Please note.

Access to survey links may not be provided until a signed MOU is returned.

Step 7

Train site coordinators and proctors.

Please see our [Guide to Training Site Coordinators and Proctors](#).

Step 8

Send survey links to site coordinators.

Please review our [Guide to Understanding and Sharing Your Survey Link File](#).

Step 9

Submit enrollment and report order in portal to receive a cost estimate.

To review the process for ordering reports, please refer to our [Guide to Ordering and Receiving Reports](#) and our [Guide to Qualifying for Reports](#).

If using a purchase order for billing, inform your TA.

Step 10

Contact your CalSCHLS TA when surveying is complete.

This step is critical for us to begin report production. Make sure you have a system in place to receive notifications from your school sites so you can share this information with your TA as soon as surveying is done.

If you have additional questions, please email calschls@wested.org with a clear subject line so we can route your question to the appropriate support personnel.