Standard Operating Procedure (SOP) for Processing Paper Surveys for Events

Document Control

SOP Number: [Insert Number]
Version: [Insert Version]
Effective Date: [Insert Date]
Review Date: [Insert Date]
Prepared By: [Insert Name/Position]
Approved By: [Insert Name/Position]

1. Purpose

This SOP outlines the procedures for processing paper surveys collected during events, including digitization and data management. The goal is to ensure accurate and efficient data handling for analysis and reporting.

2. Scope

This procedure applies to all staff involved in collecting, processing, and analyzing paper surveys for events.

3. Responsibilities

Event Coordinator: Ensure surveys are collected and stored properly. Data Entry Personnel: Responsible for digitizing the paper surveys. Quality Control: Review the digitized data for accuracy.

4. Materials Needed

Paper surveys Scanning device (scanner or mobile app) Computer with data entry software (e.g., Excel, Google Sheets) Data cleaning tools (if applicable) Backup storage (cloud or external hard drive)

5. Procedure

5.1 Collecting Paper Surveys

Ensure surveys are completed fully by participants. Collect surveys at the end of the event or designated collection points. Store surveys securely in a designated area to prevent loss or damage.

5.2 Preparing for Digitization (not done)

- Create excel sheet to compile responses
  - include all respondents and their responses
  - should include columns for:
    - Respondant name
    - Respondent type
      - should fall under the current list
        - Legislator

- - - Executive Official
    - Education Leader
  - Question$_1$ - Question$_n$ headers
    - fill out questions based on how you would like them to be displayed.
    - see guidelines below for more info on how to format question headers

5.2.1: File upload Values

Column	Column Header	Accepted Row Values
Name	"name", "respondent"	name or "anonymous"
Type	"Type"	Respondent type (legislator, executive official, education leader, other)
Other		Only fill in if Type is "other"
Question$_n$	[Question as you would like displayed] for Session Rating: "Session Rating: [Session name]" Material Rating: "Material Rating: [Material name]"	Quantitative Values: Likert scale (1-5) Qualitative Values: Text

5.2.1: Example

name	I found the communications received prior to the Retreat were useful.	I found the materials used during the Retreat were informative.	I found the Retreat fostered nonpartisan dialogue on critical topics in education policy.	I found the Retreat fostered relationship-building across the aisle.	How likely are you to engage the Hunt Institute as a resource in your work?	How likely are you to use information and/or policies you learned about at the 2024 Oklahoma Legislators	Session: The Science of Economic Case for Investing in Early Childhood	Session: Overall, the session moderators effectively guided the conversation.	Session: Overall, the session resource experts were very knowledgeable.	Please share any additional comments and/or feedback about written materials here.	Please share any other comments and/or feedback about the Retreat here.
Rep. Andy Fugate	4	5	5	5	4	5	5	4	5	Issue Brief is terrific	Thoroughly enjoyed visiting w/ Secretary

Check Completeness: Ensure all surveys are complete and legible. Remove any surveys that are damaged or unusable. Organize Surveys: Sort surveys by type or session to streamline data entry.

5.3 Digitization Process

Scanning: Use a scanner or a mobile app to digitize each paper survey. Save scanned files in a designated folder on your computer. Choose a file format (e.g., PDF, JPG) that maintains clarity.
Data Entry: Open the digitized survey in your data entry software. Input responses accurately, following the survey structure. Use drop-down lists or checkboxes for standardized responses to minimize errors.

5.4 Data Cleaning

Review the entered data for accuracy. Correct any discrepancies or errors found during the review. Remove duplicates if applicable.

5.5 Data Submission

Save the finalized dataset in an accessible and secure location. Back up the data regularly (e.g., weekly) to prevent loss.

5.6 Analyzing Data

Prepare the data for analysis based on event objectives. Use appropriate statistical methods and tools to analyze responses.

5.7 Reporting Results

Compile the findings into a report or presentation. Share the results with relevant stakeholders in a timely manner.

6. Considerations for Digitizing Paper Surveys

Legibility: Ensure that handwriting is clear and easily readable to avoid misinterpretation. Data Privacy: Protect sensitive information in compliance with privacy regulations (e.g., GDPR). Format Consistency: Maintain consistency in how data is entered to facilitate analysis (e.g., use the same units or scales). Training: Provide training for personnel on how to digitize and enter data accurately. Feedback Loop: Implement a process for staff to report issues or suggest improvements to the digitization process.

7. Review and Revisions

This SOP should be reviewed annually or as needed to incorporate improvements or changes in technology.

Version Log