

Microsoft 365 Copilot Evaluation Toolkit for Education

The Microsoft 365 Copilot Evaluation Toolkit is a collection of research instruments and resources to help education leaders collect insights around Copilot deployment, impact and use cases.

Provided both [K12](#) and [Post-Secondary](#) versions.



Microsoft 365 Copilot



Overview

Designed with experts from Digital Promise. These resources will help inform strategy, training and implementation.



Deployment and Analysis Guides

Use your own data to uncover trends and patterns in Microsoft 365 Copilot usage.



Customizable Surveys

K12 and Post Secondary
Tailored for teachers, instructional coaches, IT staff and administrators.



Professional Conversation Guide

Question-based discussion guide inspired by the SAMR technology integration model.

Microsoft 365 Copilot Evaluation Toolkit for Education

The Microsoft 365 Copilot Evaluation Toolkit is designed to help schools evaluate the implementation and impact of Microsoft 365 Copilot.

It consists of two main components: a customizable survey and a conversation matrix. The survey collects data from multiple perspectives, including teachers, instructional coaches, IT staff members, and leaders/administrators. The conversation matrix complements this by fostering reflective discussions about early uses of Microsoft 365 Copilot across classroom and administrative contexts.

Together, these tools provide structured approaches for assessing Microsoft 365 Copilot's impact on teaching, learning, and school operations.

Microsoft 365 Copilot Evaluation Survey

- **Survey Deployment Guide:** Step-by-step instructions for customizing, piloting, and distributing surveys, including guidance for using the Question & Item Bank.
- **Survey Templates:** Pre-designed templates in Word, Forms, and PDF formats, tailored to K-12 roles with common and role-specific questions.
- **Question & Item Bank:** A flexible repository of survey questions, response options, and Likert-scale items.
- **Survey Analysis Guide:** Detailed strategies for analyzing survey data using Microsoft 365 Copilot in Excel to uncover trends and insights.

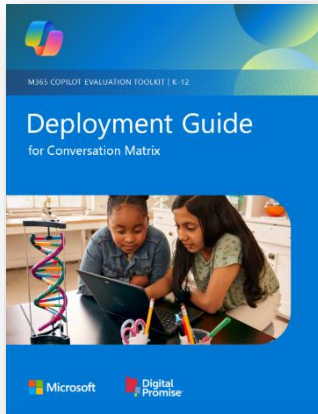
Professional Conversation Guide

- **Conversation Deployment Guide:** A guide for facilitating open, SAMR-informed discussions on early uses of Microsoft 365 Copilot in education.
- **Conversation Matrix:** A structured tool with SAMR-based questions to explore Microsoft 365 Copilot's role in transforming teaching, fostering collaboration, and addressing ethical AI use.
- **Conversation Analysis Guide:** Techniques for summarizing discussions, identifying patterns, and organizing insights by SAMR levels or implementation dimensions.

Microsoft 365 Copilot Evaluation Toolkit: K12

Professional Conversation Guide Assets: K12

[K12 Deployment Guide for Conversation Matrix](#)



Deployment Guide for K-12 M365 Copilot Conversation Matrix

The M365 Copilot Conversation Matrix helps initiate discussions on early uses of M365 Copilot in K-12 education. The matrix can be used to support a conversation between a school leader and one or more teachers, or it could be used to generate broader conversation among a group of teachers.

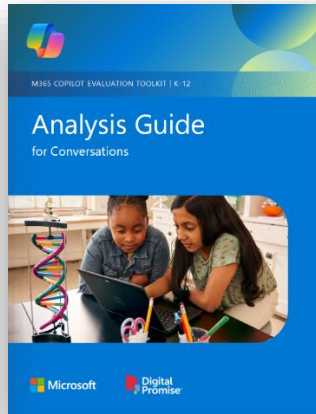
The matrix is based on [Buckleberg's \(2015\) SAMR framework](#), a well-known "bookmark-sticker" that categorizes technology integration into four levels:

1. **Substitution:** Technology is used to replace traditional methods with no functional change (e.g., typing instead of handwriting).
2. **Augmentation:** Technology enhances traditional tasks with added features or functionality (e.g., using spell check in a word processor).
3. **Modification:** The use of technology results in a significant redesign of the task (e.g., real-time collaboration in online documents).
4. **Redefinition:** Technology creates opportunities for entirely new tasks that were previously impossible (e.g., virtual reality field trips).

The Conversation Matrix pairs the SAMR levels with five dimensions of M365 Copilot implementation:

1. **Success Stories & Emerging Practices:** Examples of how teachers have experimented using M365 Copilot in their teaching or for administrative tasks, including features of the tool that have been most helpful.
2. **Planning & Implementation:** Explores how teachers have used M365 Copilot to improve lesson plans or classroom activities, and how the tool has impacted how teachers communicate with students and colleagues.
3. **Efficiency Gains:** Examples of how M365 Copilot has helped teachers automate repetitive tasks, improve their workflow, or make it easier to create personalized learning materials for students.
4. **Professional Learning:** The role M365 Copilot might play in fostering professional learning communities, supporting interdisciplinary collaboration. Questions also probe teachers' feelings of confidence when using the tool.

[K12 Analysis Guide for Conversation Matrix](#)



Analysis Guide for Conversations about M365 Copilot Use in K-12 Education

- Step 1: Use M365 Copilot to Summarize a Single Conversation
- If you've recorded the discussion with Teams, you can view the [guidelines](#) for a quick summary of the main points that were discussed.
 - However, you can obtain deeper insights if you use Copilot to ask questions about the meeting transcript directly.
 - Start with a general prompt that describes the context of the task and provides instructions for analyzing the transcripts, such as the example prompt below:

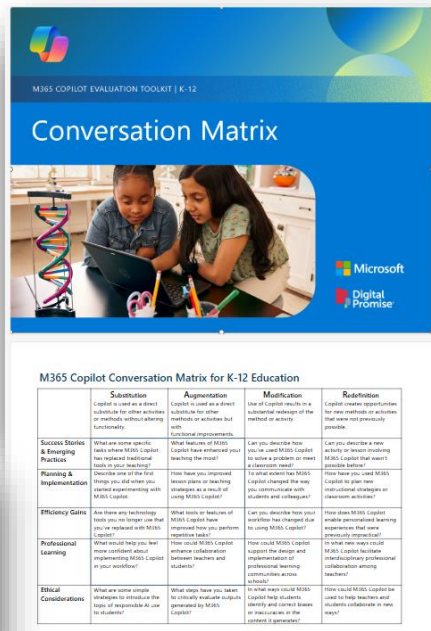
Summarize the meeting transcript using clear and concise language. The transcript captures a discussion between a school leader and a teacher about using M365 Copilot for teaching and learning. Your summary should include:

1. Any points raised by the teacher about how they are using M365 Copilot.
2. Successes and challenges the teacher experienced when using Copilot.
3. Actionable next steps or recommendations for learning how to use Copilot effectively for instructional activities and administrative tasks.

- You can further customize the analysis by asking Copilot to analyze the transcript based on the SAMR categories and dimensions of implementation. Once again, start with a general prompt that describes the context of the task and provides instructions. For example:

Summarize the meeting transcript using the SAMR model as an organizing framework. SAMR categorizes educational technology use into four levels: Substitution, Augmentation, Modification, and Redefinition. Technology is a direct replacement with no functional change. Augmentation technology provides enhanced functionality. Modification technology enables significant task redesign, and Redefinition technology enables new tasks that were previously not possible.

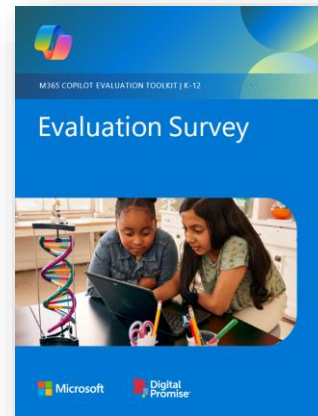
[K12 Conversation Matrix](#)



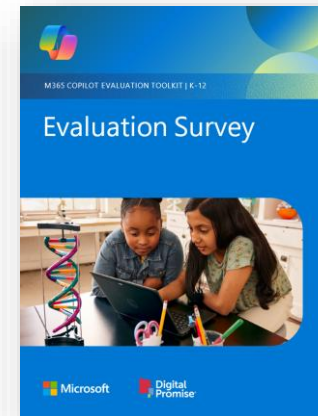
M365 Copilot Conversation Matrix for K-12 Education

	Substitution Copilot is used to do a direct substitute for other activities or methods without changing functionality.	Augmentation Copilot is used as a direct substitute for other methods or activities but with functional improvements.	Modification Use of Copilot results in a substantial redesign of the method or activity.	Redefinition Copilot enables opportunities for new methods or activities that were not previously possible.
Success Stories & Emerging Practices What are some specific ways where M365 Copilot has replaced traditional tools in your teaching? Describe one of the things you did when you started experimenting with M365 Copilot.	What features of M365 Copilot have enhanced your teaching the most? How have you improved lesson plans or teaching strategies as a result of your collaboration with M365 Copilot?	Can you describe how you've used M365 Copilot to solve a problem or meet a challenge in your teaching? How have you used M365 Copilot to plan new instructional strategies or classroom activities?	Can you describe a new activity or lesson involving M365 Copilot that wasn't previously possible? How have you used M365 Copilot to plan new instructional strategies or classroom activities?	Can you describe a new activity or lesson involving M365 Copilot that wasn't previously possible? How have you used M365 Copilot to plan new instructional strategies or classroom activities?
Efficiency Gains Are there any technology tasks you no longer do that you've replaced with M365 Copilot? What are some ways you've improved your workflow when using M365 Copilot?	What tasks or features of M365 Copilot have improved how you perform repetitive tasks? How could M365 Copilot enhance collaboration between teachers and students?	Can you describe how your workflow has changed as a result of using M365 Copilot? How could M365 Copilot support the design and implementation of professional learning communities among teachers?	How does M365 Copilot enable personalized learning to support individual students? In what new ways could M365 Copilot enhance interdisciplinary professional collaboration among teachers?	How does M365 Copilot enable personalized learning to support individual students? In what new ways could M365 Copilot enhance interdisciplinary professional collaboration among teachers?
Professional Learning What are some ways you've improved your workflow when using M365 Copilot? What are some ways you've improved your workflow when using M365 Copilot?	What tasks or features of M365 Copilot have improved how you perform repetitive tasks? How could M365 Copilot enhance collaboration between teachers and students?	Can you describe how your workflow has changed as a result of using M365 Copilot? How could M365 Copilot support the design and implementation of professional learning communities among teachers?	How does M365 Copilot enable personalized learning to support individual students? In what new ways could M365 Copilot enhance interdisciplinary professional collaboration among teachers?	How does M365 Copilot enable personalized learning to support individual students? In what new ways could M365 Copilot enhance interdisciplinary professional collaboration among teachers?
Ethical Considerations What are some ways you've improved your workflow when using M365 Copilot? What are some ways you've improved your workflow when using M365 Copilot?	What tasks or features of M365 Copilot have improved how you perform repetitive tasks? How could M365 Copilot enhance collaboration between teachers and students?	Can you describe how your workflow has changed as a result of using M365 Copilot? How could M365 Copilot support the design and implementation of professional learning communities among teachers?	How does M365 Copilot enable personalized learning to support individual students? In what new ways could M365 Copilot enhance interdisciplinary professional collaboration among teachers?	How does M365 Copilot enable personalized learning to support individual students? In what new ways could M365 Copilot enhance interdisciplinary professional collaboration among teachers?

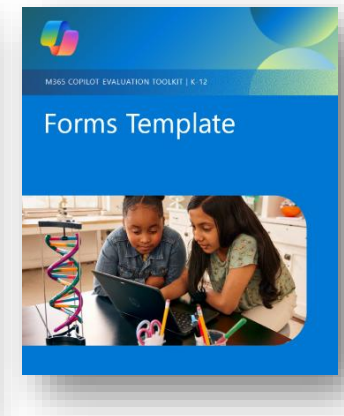
Survey Assets: K12



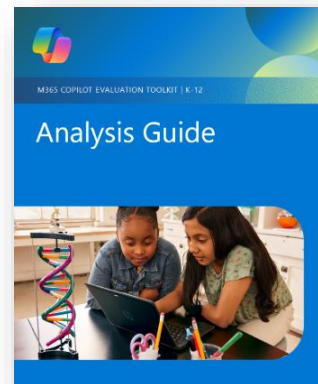
[K12 Evaluation Survey - Word doc](#)



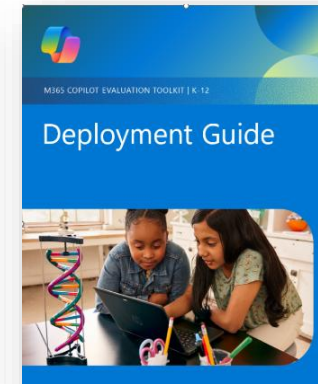
[K12 Evaluation Survey - PDF doc](#)



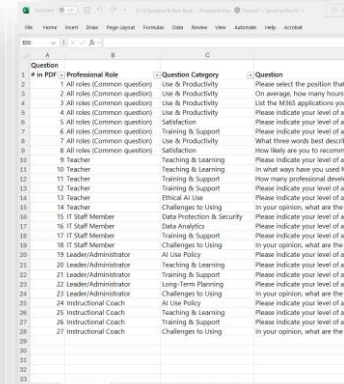
[K12 Survey Forms Template](#)



[K12 Survey Analysis Guide](#)



[K12 Survey Deployment Guide](#)



[K12 Questions & Items Bank - Excel](#)

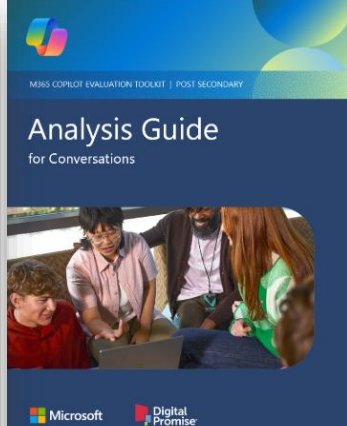
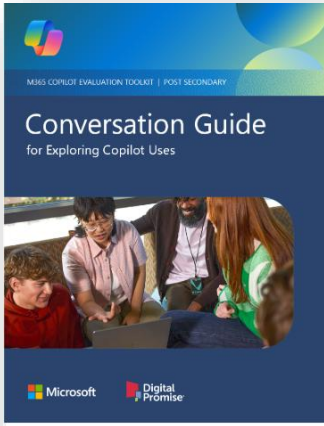
Microsoft 365 Copilot Evaluation Toolkit: Post-Secondary

Professional Conversation Guide Assets: Post-Secondary

Post-secondary Deployment Guide for Conversation Matrix

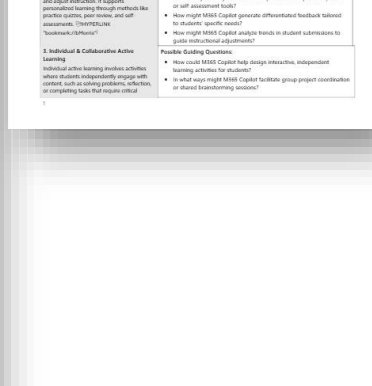
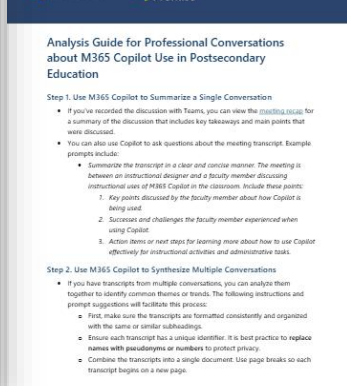
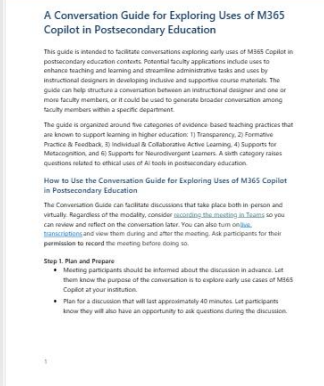
Post-secondary Analysis Guide for Conversation Matrix

Post-secondary Conversation Matrix

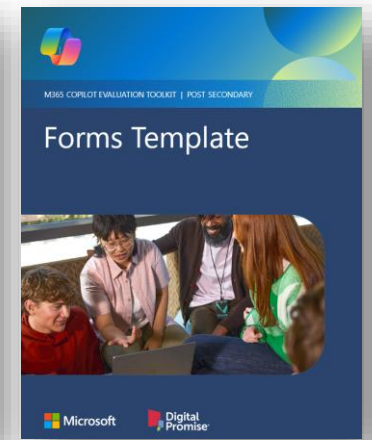
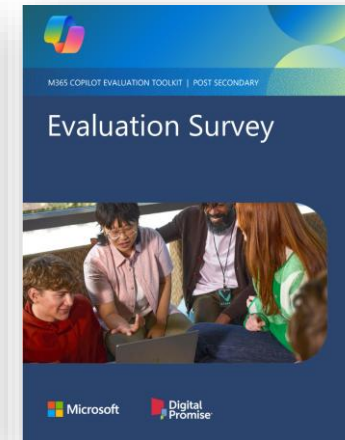
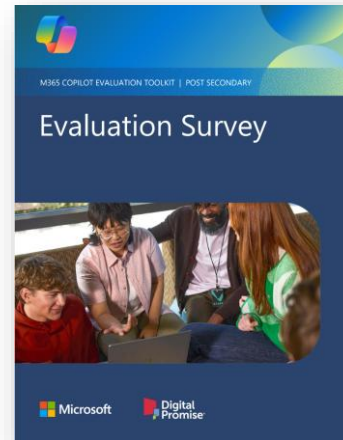


M365 Copilot Professional Conversation Guide for Postsecondary Education

- 1. Transparency**
 - How can M365 Copilot help you clearly communicate assignment opportunities to students?
 - How could M365 Copilot assist in creating visual summaries of learning objectives for your courses?
 - How might you use M365 Copilot to ensure grading rubrics are consistently aligned with learning goals?
 - How can M365 Copilot help highlight connections between course content and broader career or academic goals?
- 2. Formative Practice & Feedback**
 - How could M365 Copilot assist in generating personalized feedback for students?
 - In what ways could you use M365 Copilot to create practice questions or self-assessment tools?
 - How might M365 Copilot generate differentiated feedback tailored to students' specific needs?
 - How might M365 Copilot analyze trends in student submissions to guide instructional adjustments?
- 3. Individual & Collaborative Active Learning**
 - How could M365 Copilot help design interactive, independent learning activities for students?
 - In what ways might M365 Copilot facilitate group project coordination or shared brainstorming sessions?



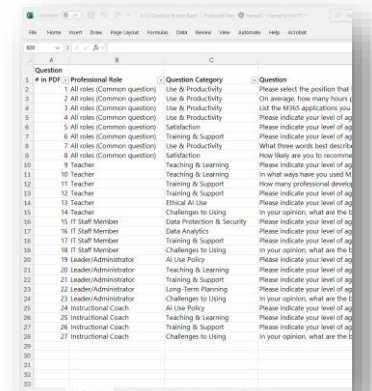
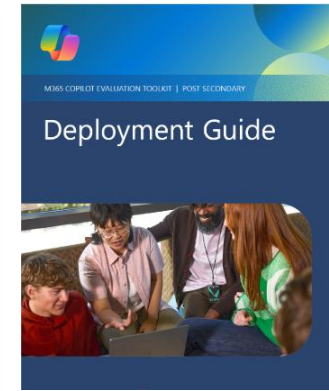
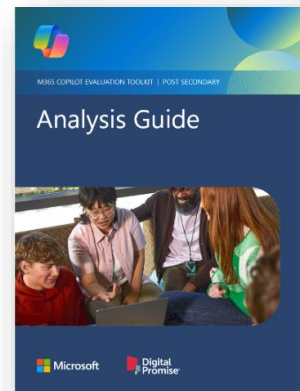
Survey Assets: Post-Secondary



Post-secondary Evaluation Survey – Word doc

Post-secondary Evaluation Survey – PDF doc

Post-secondary Survey Forms Template



Post-secondary Survey Analysis Guide

Post-secondary Survey Deployment Guide

Post-secondary Questions & Items Bank - Excel