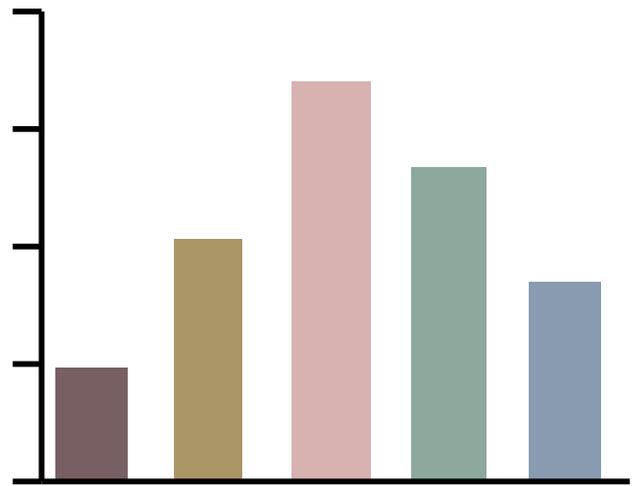


So
You
Want
To
Run
A
Staff
Survey?



Birdsong Charity Consulting

People work best when they feel good about themselves - when they're enjoying their work, feeling motivated and appreciated. They don't work best when they feel over-stressed, over-worked and over-looked.

Healthy people create healthy organisations and Birdsong exists to help charities work more effectively with their people. We help charities to become thriving, vibrant organisations where people love to work. We believe that people can achieve amazing things so if you put your people first the results will follow.

You can't create a healthy organisation if you don't know what your staff really think. Staff surveys are an effective means of understanding what your charity does well and where it could do better.

In this document we've drawn together what we've learnt from running staff surveys for charities. If you're thinking about conducting a staff survey, we hope this guide will help you.

If you'd like our help, then do please get in touch.

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Getting Started

A staff satisfaction survey give employees an opportunity to provide honest feedback on how they feel about their job and their organisation. It is not a substitute for good management, but it identifies areas for improvement and helps to prioritise them.

If managed well, a staff survey is a tangible demonstration that a charity cares about its staff and values their opinions - and the survey process itself can contribute to improved staff satisfaction. If managed badly, however, it can seriously damage staff trust in senior management.

The Do's

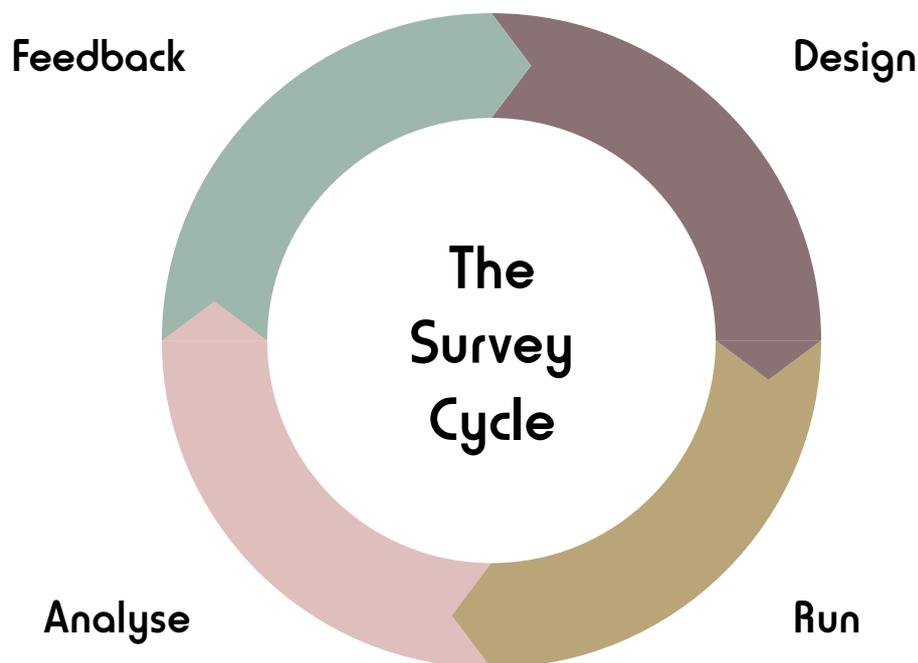
- Get senior management buy-in to the process
- Involve staff
- Think carefully about the timing of the survey
- Decide on the frequency. Do you want to hold a survey every year?
- Keep the majority of questions consistent year on year to enable trend analysis
- Include open questions to enable staff to express what really matters to them
- Ensure confidentiality
- Feedback the results to everyone
- Be prepared to act on the outcomes - and communicate on-going progress

And the Don'ts

- Don't run the survey when most of your staff are on holiday
- Don't run a survey for the first time in the middle of major organisational change
- Don't avoid asking difficult questions, but...
- Don't ask questions you don't want to hear the answers to
- Don't make the questionnaire so long that staff lose the will to live before they've completed it
- Don't make the survey complex - keep it simple
- Don't attempt to run a staff survey unless you have the resources and expertise to run it well
- Don't over-analyse the results

The Survey Cycle

The diagram below shows the four basic steps in the survey cycle.



Working with the annual planning process

A staff survey should not be seen as a one-off exercise - but rather an annual activity that feeds into the charity's annual planning process. It is important that the results of the survey are treated seriously and so the timing of the results of the survey needs to fit with the charity's ability to act on them.

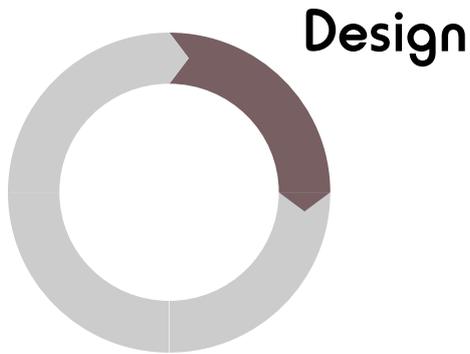
For example, if the survey reports immediately after the annual planning process there will be a years' delay in any significant action being taken, or the planning process will need to be unpicked, neither of which is desirable. So before beginning a staff survey, think about the overall timing.

How long is the survey cycle?

Typically, a survey takes six months to complete, broken down as follows:

- Design 2 months
- Run 1 month
- Analyse 1 month
- Feedback 2 months

The timescales do vary. The design and feedback stages are particularly variable, depending on the level of staff consultation undertaken.



The design of the survey is important. It's at this stage you will start to engage your staff or lose them. Remember, the reason why the design stage is there is not to tell staff what going to happen, but to genuinely involve them in arriving at a meaningful survey.

Designing Questions

- What do you want to find out?
- Do you want to compare with historical survey data?
- Do you want the survey to provide input to your Investors in People process?
- Do you want to be able to benchmark your findings against external data sources?
- Are your questions clear and unambiguous?
- Do you need to ask all those questions? If the survey is too long, it won't be completed.

Consulting Staff

- Can you use an existing employee communication system?
- Do you need to set up a staff consultation group?
- Have you communicated the purpose of the survey to all staff?
- Have you managed staff expectations?
- Have you ensured anonymity? Without this you will not get honest feedback.
- Are you crystal clear about how the results will be communicated? Who will see what?

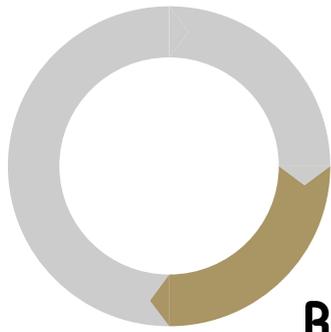
Benchmarking

- Who do you want to benchmark against - other charities, other sectors?
- Do you know what benchmark data is available?
- Will the benefit justify the cost of buying external data?
- Do you want to use **Charity Pulse**¹ data?

Online?

- Will your staff find it easier to respond to an online or paper survey - or do you need to provide both?
- What about remote workers or those that do not have access to a computer?
- Do you have the time, resources and expertise to set up an online survey yourself or do you need the help of an external provider?

¹ See page 9 - Working with Charity Pulse



Run

Allow the survey to run for a period of at least three weeks to ensure that all staff will have the opportunity to take part.

Relax!

If the survey is set up well and launched with an explanatory and encouraging email or letter, there is not much to do at this stage.

Respond to queries

Refrain from constant reminders to staff. But respond to any queries they may have about content or process.

If you have involved a staff consultation group in the process, they can provide a useful function at this stage.

Monitor the responses

Monitor the number of responses and keep an eye out for any sensitive issues arising in response to open questions.

Chase the slackers!

Do provide timely reminders about the importance of the survey. Perhaps surprisingly, it will not be at the top of everyone's inbox.

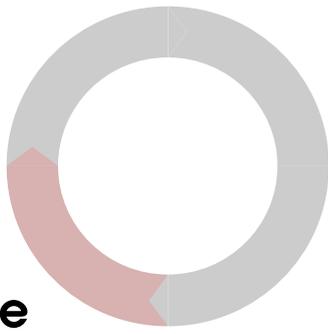
What's a good response rate?

Don't expect a 100% response.

Over 50% is OK

Over 65% is good

Over 80% is excellent



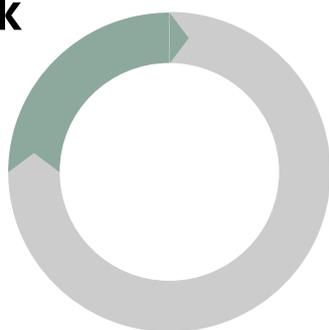
Analyse

Now that your staff have responded to the survey you can analyse the results. There is no need to use a sophisticated analysis software package to do this - Excel or an equivalent is a perfectly acceptable tool.

Remember that the results of the analysis will not tell the organisation what to do - but they will provide valuable input to decision-making.

<p>What's the big picture?</p> <p>How many people responded? The response rate is a good indication of the level of staff confidence in the process.</p> <p>Where do the majority of staff think the organisation is doing well?</p> <p>Where do they think there is room for improvement?</p> <p>Are the issues about the organisation, morale, pay and reward, management, communication or training and development?</p>	<p>Looking at the detail</p> <p>Are views generally held or are some staff more concerned than others?</p> <p>Are some departments more satisfied?</p> <p>Are your managers more or less happy than other groups?</p> <p>Have you sub-analysed to a level where individuals could be identified?</p> <p>What are the reasons behind any variances?</p>
<p>How much is significant?</p> <p>How small is your sample? Be careful when analysing small response quantities.</p> <p>Variances between small sub-sets are only indicators of possible issues - investigate further.</p> <p>As a guide - less than 5% variance in a sample size of 100 people is unreliable.</p> <p>If you align your survey with a sector-wide study (such as Charity Pulse) analyse where your results are significantly better or worse than the sector as a whole.</p>	<p>Trends</p> <p>What's better this year?</p> <p>And what's worse?</p> <p>If you have several years' data, what are the longer-term trends?</p> <p>Are there logical explanations for the trends?</p> <p>If the reasons are unclear, work with your staff consultation group to uncover any hidden issues.</p>

Feedback

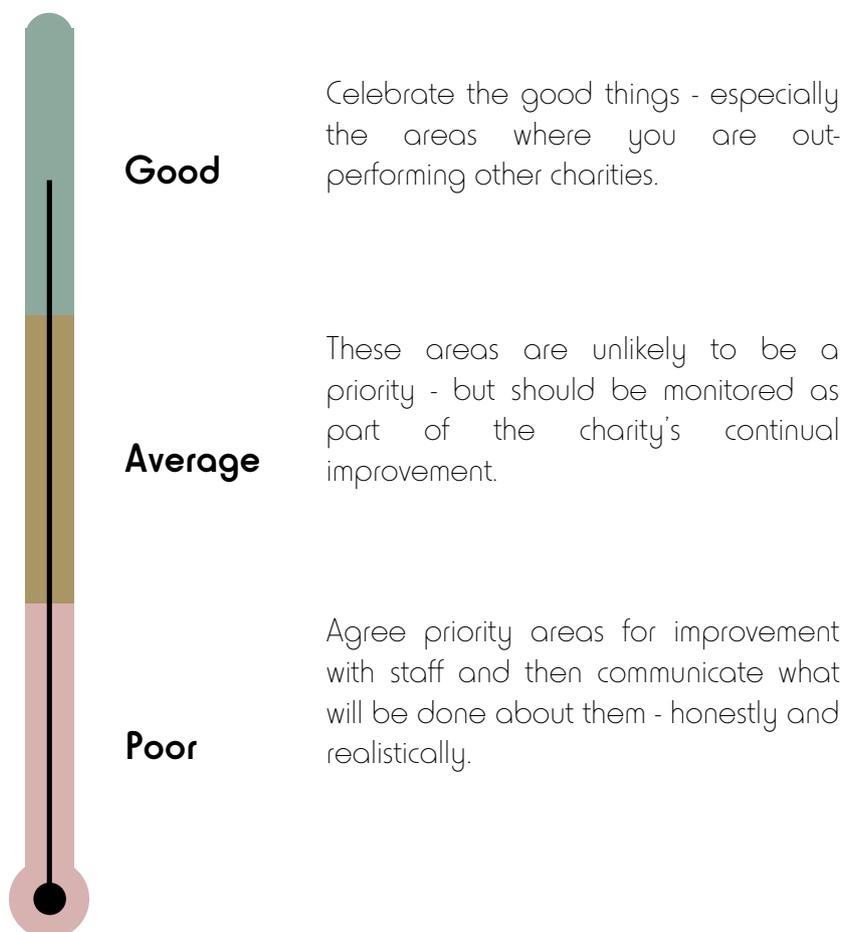


Feed back the good, the bad and the ugly. Do not sugar coat the results - this will lead to mistrust and undermine the process for future years. If your survey has highlighted that something is really wrong in your organisation - acknowledging this is an important step in moving forward.

Identify the priority areas for improvement and a proposed action plan in consultation with staff. Do nothing at your peril!

You may not know what to do about some of the issues the survey has highlighted. Don't be tempted into action for its own sake. There's nothing wrong with saying that the organisation needs some time to work out where to go from here. If you need to do this, explain how staff will be involved and informed during this period.

Benchmarking helps to put your results in context. It can reinforce where you are doing well and give other results a broader perspective. Conversely, it can show up where you are underperforming.



And finally...

Remember

Your people will only continue to have confidence in your survey process if:

- You involve them in the design
- Do it regularly
- Share the results
- Take some action

Working with Charity Pulse

Charity Pulse is a unique approach to measuring staff satisfaction in the UK voluntary sector. Each year, with the help of Third Sector magazine, we ask people working for charities to give us their views on topics including morale, work/life balance, people management and communications in their organisations. Our aim is to build up a picture of working life in charities and provide data to enable charities to benchmark their staff satisfaction.

Anyone who works for a charity can take part. Typically 700 people take the survey each year, representing over 150 different UK charities.

You can download FREE reports on previous years' results at www.bird-song.co.uk.

The Charity Pulse survey opens in March each year at:

www.bird-song.co.uk

www.thirdsector.co.uk

The data collected is analysed at a sector level to enable comparisons to be made between staff satisfaction in different sub-sectors, as well as identifying any differences of opinion between functions, geographical locations, age groups, large and small charities etc.

Charities wishing to benchmark their staff satisfaction against the sector can choose to actively promote Charity Pulse to their staff or align their own staff survey with it. Individual charity data is strictly confidential and is never included in any sector-wide reporting.

For more information on how your charity could work with Charity Pulse visit: www.bird-song.co.uk and click on Our Work.