

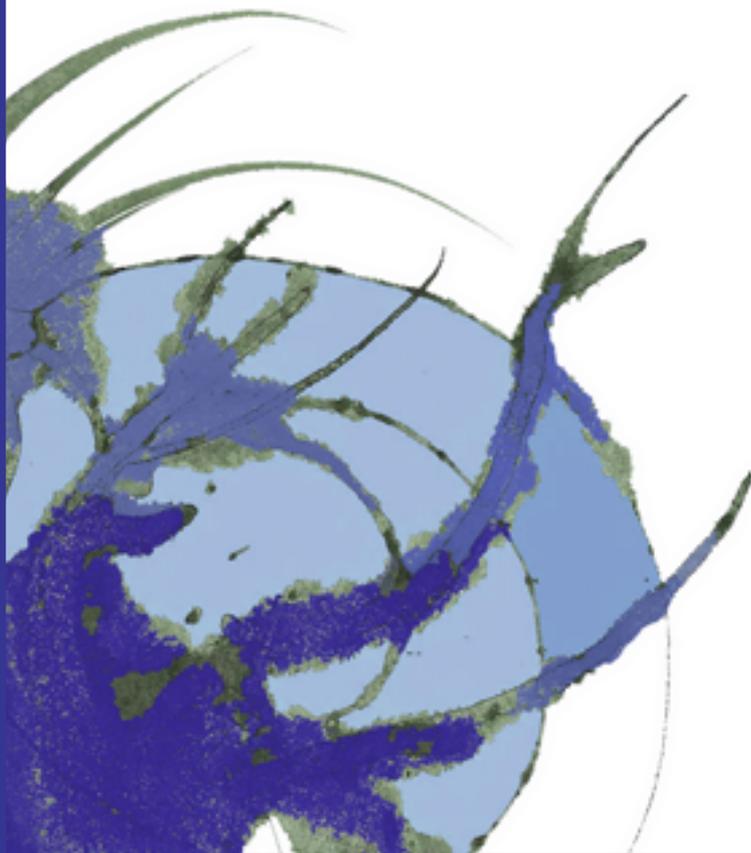
birdsong

charity consulting

So you want to run a staff survey?

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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 and 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 and feel. 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 since 2007. 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 gives 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

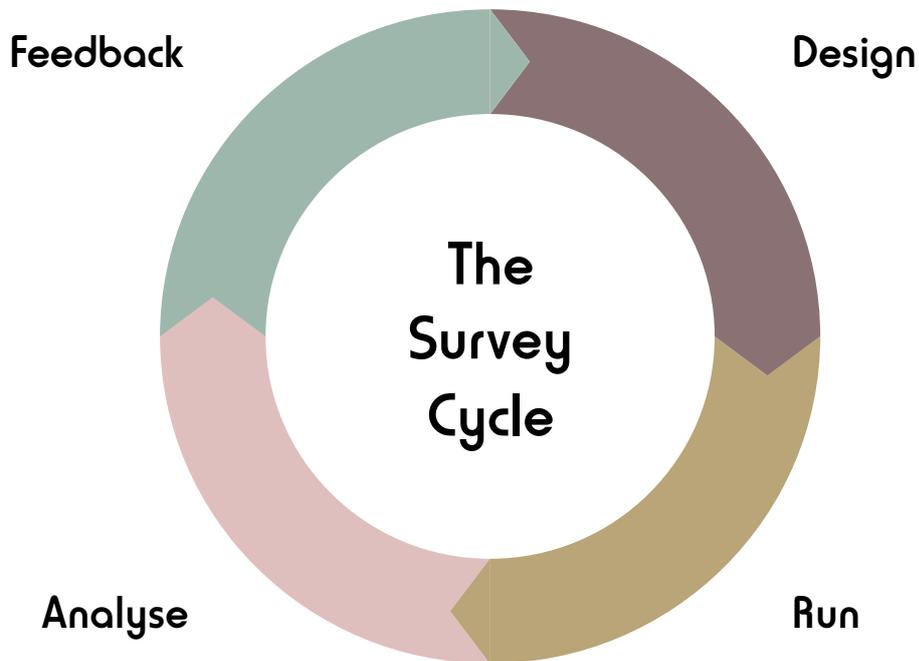
Don't attempt to run a staff survey unless you have the resources and expertise to run it well

Don't over-analyse the results

Don't run the survey when most of your staff are on holiday

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 or bi-annual activity that feeds into the charity's annual planning processes. 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.

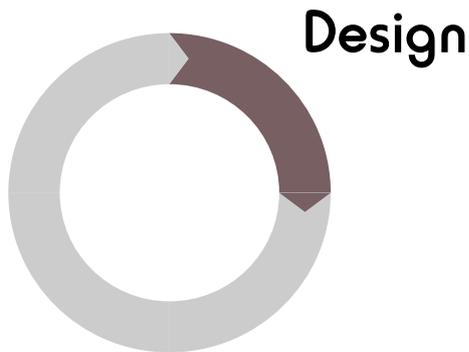
For example, if the survey reports immediately after the annual planning process there will be a years' delay in any significant action being taken, or the planning process will need to be unpicked, neither of which is desirable. So before beginning a staff survey, think about the overall timing.

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

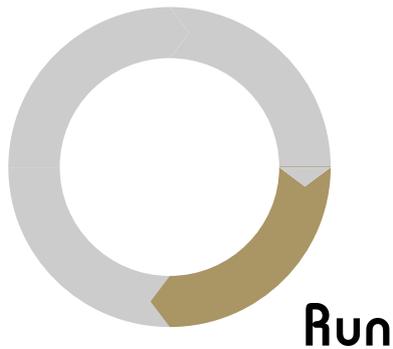
The timescales do vary. The design and feedback stages are particularly variable, depending on the level of staff consultation undertaken.



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.

<p>Designing Questions</p> <p>What do you want to find out?</p> <p>Do you want to compare with historical survey data?</p> <p>Do you want the survey to provide input to your Investors in People process?</p> <p>Do you want to be able to benchmark your findings against external data sources?</p> <p>Are your questions clear and unambiguous?</p> <p>Do you need to ask all those questions? If the survey is too long, it won't be completed.</p>	<p>Consulting Staff</p> <p>Can you use an existing employee communication system?</p> <p>Do you need to set up a staff consultation group?</p> <p>Have you communicated the purpose of the survey to all staff?</p> <p>Have you managed staff expectations?</p> <p>Have you ensured anonymity? Without this you will not get honest feedback.</p> <p>Are you crystal clear about how the results will be communicated? Who will see what?</p>
<p>Benchmarking</p> <p>Who do you want to benchmark against - other charities, other sectors?</p> <p>Do you know what benchmark data is available?</p> <p>Will the benefit justify the cost of buying external data?</p> <p>Do you want to use Birdsong's Charity Pulse¹ benchmark?</p>	<p>Online?</p> <p>Will your staff find it easier to respond to an online or paper survey - or do you need to provide both?</p> <p>What about remote workers or those that do not have access to a computer?</p> <p>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?</p>

¹ See page 9 - Working with Charity Pulse



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.

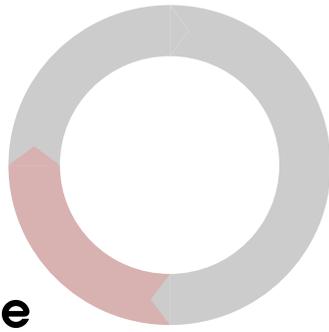
What's a good response rate?

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.

What's the big picture?

How many people responded? The response rate is a good indication of the level of staff confidence in the process.

Where do the majority of staff think the organisation is doing well?

Where do they think there is room for improvement?

Are the issues about the organisation, morale, pay and reward, management, communication or training and development?

Looking at the detail

Are views generally held or are some staff more concerned than others?

Are some departments more satisfied?

Are your managers more or less happy than other groups?

What are the reasons behind any variances?

Don't sub-analyse the data to a level where individuals could be identified.

How much is significant?

How small is your sample? Be careful when analysing small response quantities.

Variances between small sub-sets are only indicators of possible issues - investigate further.

As a guide - less than 5% variance in a sample size of 100 people is unreliable.

If you align your survey with a sector-wide benchmark (such as Charity Pulse) analyse where your results are significantly better or worse than the sector as a whole.

Trends

What's better this year?

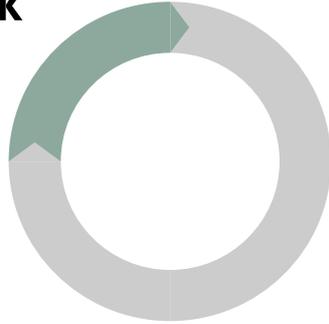
And what's worse?

If you have several years' data, what are the longer-term trends?

Are there logical explanations for the trends?

If the reasons are unclear, work with your staff consultation group to uncover any hidden issues.

Feedback

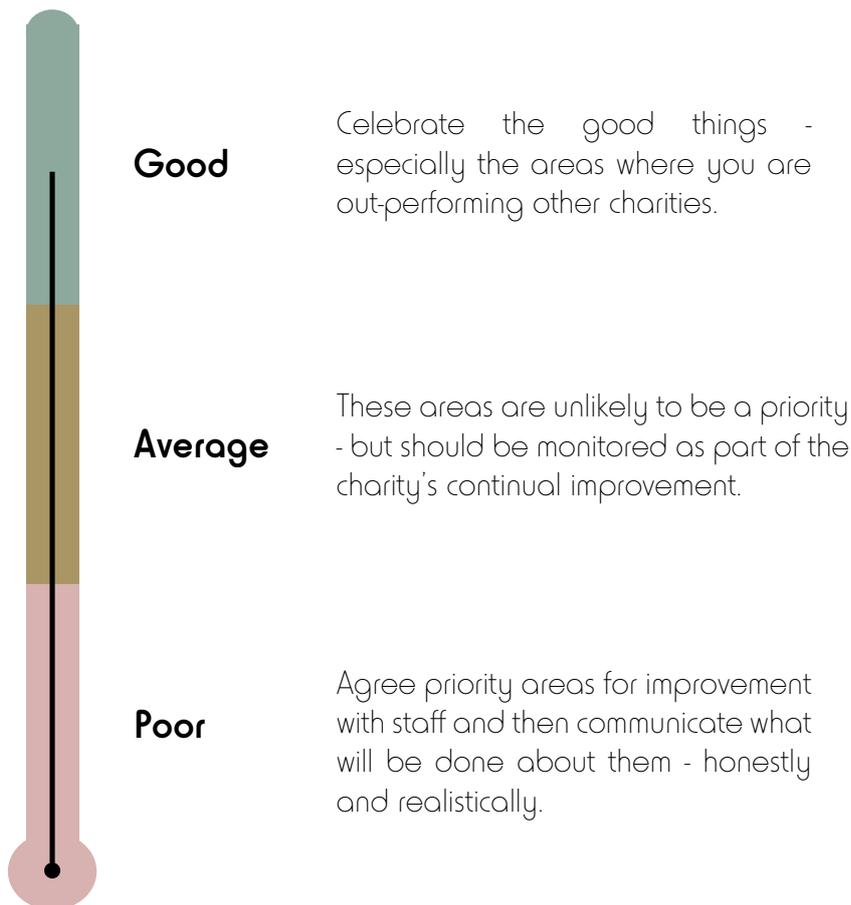


Feed back the good, the bad and the ugly. Do not sugar coat the results - this will lead to mistrust and undermine the process for future years. If your survey has highlighted that something is really wrong in your organisation - acknowledging this is an important step in moving forward.

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.



Remember

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

- involve them in the design
- you do it regularly
- share the results
- take some action

Working with Charity Pulse

Birdsong is an established and trusted provider of staff surveys. Each year we run surveys for over 60 different charities – large and small – helping them to improve their staff satisfaction and engagement.

Birdsong has developed a range of services to enable voluntary sector leaders and HR professionals to gather the honest opinions of their people.

At the core of our approach is Charity Pulse, a voluntary sector staff satisfaction survey developed by Birdsong. The survey probes the issues that matter most to charity staff through a set of 46 carefully crafted questions.

Charities can run a Charity Pulse staff survey at any time of year but, each spring for a six-week period, we provide the opportunity for charities to run the survey at a specially reduced rate.

Birdsong also works with charities on bespoke staff surveys, tailored to meet their particular requirements.

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