Employee Engagement Survey Toolkit

Acknowledgements

This document and this effort is the product of collaboration among a number of departments and individuals at Organization including:
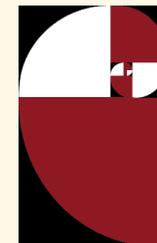
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Additional content was provided by MOR Associates, the outside firm Organization is partnering with in this effort. Chris Paquette, MOR Senior Survey Consultant, contributed to the development of this toolkit.

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Introduction

This toolkit is intended to be a resource for Organization staff who are charged with using Organization's Staff Survey to make Organization an even better place to work. This part of the toolkit is intended to familiarize the reader with the purpose, concept and processes related to the Staff Survey. Other sections of the toolkit are intended to assist managers and HR with action steps to address the outcomes and feedback from the Survey.

The buttons to the right appear throughout this document and can be used to navigate to specific pages or areas of interest. Likewise, there are active links that lead to outside web pages and/or downloads.

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The History of Organization's Staff Survey

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What Is Engagement and Why Is It Important?

It seems rather obvious to state that people who are engaged in their work are more productive than those who are disengaged. The former are excited about doing good work, while the latter may just be doing the absolute minimum or not doing their jobs at all. And somewhere in the middle lie the non-engaged; these are people who are doing their jobs, but they have more to give, sometimes a lot more, and for whatever reasons, they're not motivated to give it.

Clearly, there is a benefit to organizations to have engaged employees. It is equally beneficial to employees to be engaged. After all, who among us doesn't want to have a job that energizes and excites us? Or, as the saying goes, "Do something you love and you'll never have to work a day in your life." Given the powerful intersection of organizational and individual interests that engagement represents, it's no wonder that engagement has become an area of focus for organizations looking to be their best.

The central premise of focusing on engagement is that it is within the power of organizations and individuals to increase engagement, and by doing so, organizations can get more out their employees and employees can get more out of their work.

Engagement Definitions

Engagement is the subject of ongoing study, marked by both competing and complementary theories. It follows that there is more than one definition of engagement. The table below captures some leading definitions of engagement.

Researcher	Definition
Kahn (1990)	"the harnessing of organization members to their work roles" "people employ and express themselves physically, cognitively, and emotionally during role performances"
Baumruk (2004)	"the amount of discretionary effort exhibited by employees in their job"
Truss et al (2006)	"passion for work"

It is possible to synthesize a simple definition that encompasses most leading theories:

> *Engagement is a psychological state in which employees are motivated to give their best effort.*

For the purposes of the Organization Staff Survey, we will are using Baumruk's definition, "the amount of discretionary effort exhibited by employees in their job," as our measure of engagement.

Engagement Case Studies

The benefits of increased engagement are well documented. Increased engagement is associated with increased productivity, higher quality results, better customer service, increased morale, lower turnover, and lower absenteeism. Here are some materials on the benefits of engagement surveys:

This piece from Human Executive Online, The 'Virtuous Cycle' of Engagement and Productivity, discusses "…three recent reports -- from Gallup, Towers Watson and the Hay Group -- look at how intertwined and interdependent [engaged employees and productive work environments] really are.

http://www.hreonline.com/HRE/story.jsp?storyId=533340647

Organization's Dimensions of Engagement

Organization's survey will ask about the following dimensions of engagement, which research suggests can affect employee engagement:

• Challenge/Job Fit

• Communication

• Excellence

• Pride in Job and Employer

• Prospects for Personal Growth

• Recognition

• Resources

• Shared Leadership

• Supervisor Credibility

• Supervisor Fairness and Respect

• Supervisor Support

• Teamwork

How Are Dimensions of Engagement Measured?

Each dimension is measured by combining the responses to two to four questions that capture the essence of the dimension. For example, the following four questions pertain to Supervisor Credibility:

• My supervisor is knowledgeable about my work.

• I have confidence in my supervisor.

• My supervisor acts consistently.

• My supervisor sets a good example.

When the results of the survey are reported out, though individual question results will be reported out, the analysis will focus on the dimensions, not individual questions.

Are All the Dimensions Equally Important?

No. Some dimensions exert a greater effect on employee engagement than others. Not only that, but the ones that exert the most effect vary from workplace to workplace. One of the goals of the Organization Staff Survey effort is to determine which dimensions are especially important at Organization. As of this writing, we are just beginning to collect the data that will enable us to draw some conclusions.

How do you determine which ones are important?

In addition the questions asking about the various dimensions that affect engagement, the survey includes two questions that measure employee engagement itself. They are:

• I give my best effort.

• I go beyond the requirements of my job.

The responses to these two questions will be combined to create our outcome measure, "Engagement." We will then look for correlations between Engagement and the various dimensions, thus determining which exert the most influence.

Who Is Accountable for Each Dimension?

The following table lists the dimensions of the Organization Staff Survey and the parties who would probably bear some responsibility for the outcome and/or for working on improvements. Of course, employees also share responsibility for their own engagement, in that they need to be open to good supervision, good leadership, and pursuing personal growth.

The areas highlighted in green indicate places where an individual supervisor's or leader's performance may be visible in the reports.

Dimension	Immediate Supervisors	Senior Leadership	HR
Challenge/Job Fit	•		•
Communication	•	•	
Excellence	•	•	
Pride in Job and Employer	•	•	
Prospects for Personal Growth	•		•
Recognition	•	•	•
Resources	•	•	
Shared Leadership	•		
Supervisor Credibility	•	•	•
Supervisor Fairness and Respect	•	•	•
Supervisor Support	•	•	•
Teamwork	•	•	

A Note About Identifiable Supervisor Ratings

Framed in the language of the survey effort, there are three critical elements of engagement that can be improved – or worsened: safety, manager engagement, and accountability.

If the results suggest there is a problem with a specific manager, leaders should exercise care in how they respond. In highly engaged workplaces, employees feel as though they can speak up and there will be a rational, open conversation about what's wrong or what could be improved. It implies a culture where mistakes aren't fatal, but the desire to fix them is real. In the literature, it referred to as "safety." In the Organization Staff Survey, questions about safety are in the section titled Shared Leadership. Leaders set the tone around safety, and how they respond to negative results will impact their staff's engagement, including managers, going forward.

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A Note About Identifiable Supervisor Ratings - Cont'd

The more engaged managers are, the more engaged their staff are. the survey may present a wonderful opportunity for a leader to recharge a struggling manager, thus positively affecting the engagement of the manager's staff.

Note: a leader should consider thow they address a manager's poor performance carefully lest it translate into lower engagement for the manager's staff. Employees are more engaged when their managers effectively hold them or their teams accountable for results. This assumes that expectations for results have been shared, and that employees understand and have agreed to them. In this case, if a manager is not meeting expectations and there are no appropriate consequences, the manager's staff may become less engaged after the survey.

Levels of Reporting
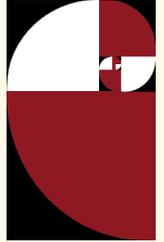
There are rules on the minimum number of responses that must be received in order for an individual group to be reported out. These minimums are thus key drivers in how far down in a given organization a report can go. In Organization's case, the current rule is that for any group to be reported out, at least six of them must respond to the survey.

How Do You Improve Engagement?

There is no single "magic bullet" or activity that's sure to increase engagement. dimensions of engagement are often entwined and improvement in one area may lead to improvement in others.

However, a critical element for improvement is leadership's follow up and accountability for addressing the issues raised in the survey. Expectations for change have been raised. How and when a department/leader addresses the issues will influence the perception of the survey process by employees. Specific actions, supported by plans and goals with measurable timelines, will demonstrate leadership's commitment and can influence employees' engagement.

There are three vital steps for moving forward:

A. Creating a communication strategy

B. Prioritizing the feedback

C. Creating a strategy to address priorities and follow up

Your HR liasons are available and to work with the sponsor and leaders to develop customized solutions. (See APPENDIX A and B)
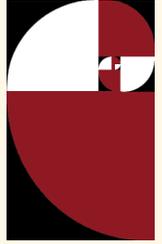
The Survey Process Timeline

The table below shows key milestones in the survey process timeline.

Phase	Time Relative to Survey Start
Sponsorship and sponsor buy-in	4+ weeks prior to open
Identifying and orienting the sponsor's project lead	4+ weeks prior to open
Agreeing on questions	2 weeks prior to open
Communicating about the survey	1 week prior to open
Survey opens	
Administering the survey	2-3 weeks after open
Analysis and reporting	3-4 weeks after close
Sharing the results	4+ weeks after close
Moving to action	6 weeks after close

Survey Process Roles

There are four main players in the survey process:

• Sponsors

• Sponsors' Project Leads

• HR liasons

• MOR

A table describing the roles associated with an individual survey effort can be downloaded here. [link]

The pages that follow provide additional information about specific steps in the survey process.

Survey Process:
## Sponsorship and Sponsor Buy-In

Committed, high-level sponsorship is key to the success of any engagement survey effort. In fact –and this is important– because the survey process touches many elements the engagement, it presents leaders with an opportunity to increase engagement…

- by making employees feel connected,

- by making them feel that their input is valued,

- by creating the sense that it is safe to provide feedback,

- and by communicating a commitment to excellence

Sponsors should be front and center in any communications about the survey, they should express a personal interest in hearing from their staff via the survey, they should create an expectation that their organizations will look seriously at the results, and they should commit to sharing what they learn from the survey. The communications templates for the survey include a leader's survey invitation to staff that demonstrates these attributes and elaborates on what else leaders might do to enhance the way the survey is perceived.
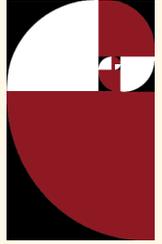
While a MOR and HR liasons will own substantial proportion of the survey work, there are important tasks that fall to sponsors and/or their representatives. Sponsors need to identify a point person who can help with the following tasks:

- Developing the survey timeline

- Gathering the sample

- Identifying each staff member's immediate supervisor

- Coordinating sponsor communications

- Responding to internal inquiries about the survey

There are potentially two parts to the Organization Staff Survey:

1. The core survey, which is constant, and

2. A small number of possible additional questions.

If asked, possible additional questions may ask about additional dimensions of engagement or they may ask about areas that are very specific to the groups participating in the survey. An example of an additional engagement dimension might be Salary and Benefits, while an example of a group-specific set of questions might be Quality of XYZ Process. So what distinguishes engagement and group-specific questions? Most importantly, it's whether or not the question is a recognized element of engagement. Another important criterion is whether or not the question applies to virtually any workplace.

Another example of a possible additional question is an open-ended text question.

Should additional questions be a feature of the survey, MOR will work with the sponsor and other stakeholders to ensure the questions are sound.

Survey Process:
Communicating About the Survey

It is simply not possible to overstate the importance of communicating about the survey. Done right, it can actually increase engagement:

• by making employees feel connected,

• by making them feel that their input is valued,

• by creating the sense that it is safe to provide feedback,

• and by communicating a commitment to excellence.

Sponsors will be provided with sound email communications templates as a starting place. But this is just a start. Sponsors should anticipate adapting and enhancing the templates to personalize them for their respective groups. The full suite of communications related to administration of the survey, including announcements, invitations, and reminders should be agreed to before the survey is announced.

The timeline for communicating about the survey begins at least one week before the survey is administered and extends past the delivery of the results and the selection of improvement goals.

Survey Process: Administering the Survey

MOR will be responsible for administering the survey. That includes sending out invitations and reminders, hosting the survey, and responding to any inquiries from respondents.

The typical window for responding is about two weeks, though that may be extended to allow for holidays or other special circumstances. There is usually one invitation and two or three reminders.

MOR will report back response rates within two business days of any invitation or reminder. To boost response rates, at some point they may ask sponsors to send a general message to their staff asking them to respond if they haven't already.

Survey Process:
Analysis and Reporting

MOR is responsible for analyzing the data and preparing reports. PDF reports will be available 3-4 weeks after the survey closes. They will be shared with the survey sponsor(s) who will then coordinate their release with HR liasons.

Elements of the Standard Report

Introduction

Methodology
- How people were selected
- Percent responding

Summary
- Correlations between individual dimensions and engagement
- Summary ratings charts and tables
- Chart showing frequency of text responses

Breakout Charts
- Charts showing comparing summary results for subgroups

A sample report can be found here: [link]

Text responses, sorted by subgroup, will be shared with the sponsor in a Word document. The sponsor has the discretion and responsibility for sharing text comments as s/he sees fit.

Survey Process:
Sharing the Results
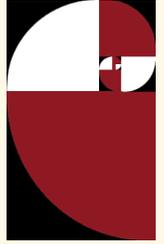
It is anticipated that sponsors will work closely with HR liasons to process the results, to share the results with staff, and to engage in follow on action planning and implementation.

As noted elsewhere, MOR will share the reports with survey sponsor(s) who will then coordinate their release with HR liasons. A slide deck showing overall ratings will accompany each standard report.

If desired, MOR is available to present the results to the sponsor or a group selected by the sponsor.

Survey Process:
Moving to Action

Organization HR will work with sponsors in the development and implementation of follow on actions that the results suggest will be useful in increasing engagement.

Click on the links below to see sample menus of follow on actions for individual dimensions. As the each iteration of the Organization Staff Survey unfolds, lessons learned and resources for effecting improvements will be added.

Dimension
Challenge/Job Fit
Communication
Excellence
Pride in Job and Employer
Prospects for Personal Growth
Recognition
Resources
Shared Leadership
Supervisor Credibility
Supervisor Fairness and Respect
Supervisor Support
Teamwork

Follow On Action Planning:
Appendix A - HR liason Planning Template
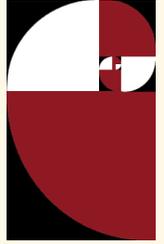
To assist with the follow on action planning, Organization HR and HR liasons have developed a template mapping out a three-step process:

Step 1: Communication – Create a Communication Strategy

Step 2: Prioritize Feedback

Step 3: Move to Action – Create a Strategy to Address Priorities and Follow-Up

The complete template can be downloaded here. [link]

Follow On Action Planning:
Appendix B - Menu of Follow On Actions

Organization HR and HR liasons have prepared a menu of follow on actions that could be applied to any individual dimension, and will work with sponsors and leaders in the development and implementation of customized solutions.