



Creating an engagement survey

Consider conducting a survey as part of your initial engagement with staff. The aim will be to identify key concerns and capture views on job pressures, pay and more. Doing so, will allow you to provide evidence that can influence discussions at a later stage with the employer, or when writing to the trust/board.

Key points to remember:

- Start planning the survey in good time to develop the questions, allowing a two or three week period for responses and sufficient time for result analysis. Survey quotes can be anonymised and incorporated into future pay claims
- Try to keep the survey short so that it is not overly demanding on staff time and they are more likely to complete it. As a rough guide, it should take between five and 10 minutes to complete, which means between 10 and 30 questions.

Requiring answers that are specific reduces the time necessary for analysis. For example, if asking “How would you describe morale?”, requiring responses of High, Moderate or Low will enable you to quickly establish from the results that, for instance, 64% of staff see morale as low. If the answer is left open, responses must be analysed one by one to place them in categories and provide usable percentages for your survey report

However, there can be a place for open-ended questions as they can generate quotes and examples of value to a claim. For instance, supplementing a survey with a question such as “In what way has your experience of work changed over the last year?” may give you a telling quote that makes a point more effectively than a page of percentages.

Profile questions can be considered at the end of surveys to enable the results to be broken down according to certain categories. You may want to assess the differing experiences of pay for different parts of the workforce, by breaking down responses by factors such as department, occupation, part-time/full-time status, income band, disability, gender, age or ethnicity.

Ensure that the survey carries a preamble that emphasises to members that the survey is completely anonymous, makes plain the purpose for which the gathered data will be used and tells them approximately how long the survey will take to complete.

Always make sure that the data you submit to the employer protects your members’

identities. The best method for protecting confidentiality and for reducing the time necessary to analyse results is to conduct an online survey. However, if the survey is sent out to email addresses, care must be taken that this is compliant with the General Data Protection Regulations. Distribution should take place through UNISON's WARMS system.

Alchemer

SurveyMonkey is one of the most widely used online survey services but UNISON now recommends Alchemer as it has EU servers and therefore complies with EU data protection law, whereas SurveyMonkey servers are US based.

Alchemer offer various packages, but UNISON recommends the standard version of Alchemer, as it fulfils the required data protection and anonymity features. Branches must set up their own online surveys and cannot use regional Alchemer accounts. We realise that at around £700 for the year Alchemer may seem expensive, but branches can use it for unlimited surveys including branch mapping surveys, consultations and member questionnaires throughout the year.

It is possible to sign up for Alchemer here: <https://www.alchemer.eu>
Its instructions on how to make voting anonymous are here:
<https://help.alchemer.com/help/anonymous-surveys>

For every Alchemer account that contains UNISON member data, a branch elected official should notify their Regional Head.

If you decide on manually distributing a hard copy survey, ensure that the survey can be returned as confidentially as possible. If circulating the survey on social media too, the advantage is that it can go wider than UNISON membership. You may gather a wider section of staff views that carries more weight with the employer and assist in recruiting members by highlighting the role of the union in advancing staff terms and conditions.