

Maximising Survey Inclusivity

The purpose of an employee survey is to solicit the views and opinions of a designated target audience. For such a survey to be of any practical value, the survey should (1) cover at least a statistically significant part of the target audience, and (2) be as inclusive as possible. Traditional paper-based and online survey methods, however, sometimes tend to preclude employees who do not have access to a PC or mobile device, or workers who lack the literacy levels to respond to paper-based surveys, or even those who may simply feel too intimidated by the survey process itself to participate in the survey.

One way of opening up a survey to a broader cross-section of the target audience is through **facilitated survey sessions**, i.e. interactive sessions where a trained facilitator contextualise and explain each survey question to groups of employees who then respond to the questions by means of wireless keypads. The how-to part of running such sessions is discussed in more detail in the remainder of this document.

Setting up and Running Facilitated Survey Sessions

Conducting a successful facilitated survey requires meticulous preparation, some rehearsal and a bit of luck when it comes to the technology.



Requirements for a Facilitated Survey Session

You will need the following:

- Venue that is large enough to accommodate all the respondents, with either a white wall or a projector screen that can be used for the video/data projector.
- Notebook, laptop or desktop PC that can run the PowerPoint presentation that you will use to display the survey questions.
- Video or data projector connected to the PC.
- A voting or audience response system (remove keypads that interface wirelessly to an USB dongle attached to your PC), with sufficient keypads for the intended audience sizes. Make sure that the audience response system is compatible with Excel and that the survey responses can be exported to Excel so they can be imported into Mindset Management's analytics dashboard. Note: audience response systems can be purchased (advisable if facilitated surveys are going to be a regular occurrence) or rented from a number of local companies.
- A skilled facilitator who can run the show and who can explain or provide context for the survey questions without inadvertently (or deliberately!) influencing the audience, and who can (if required) translate the questions into a local dialect. Care should however be taken to ensure that the facilitators are qualified to host such sessions and that they communicate and explain the survey questions consistently in the same way and at the same level of detail during all facilitated survey sessions.
- If necessary, co-opt the services of a translator and/or a technical person who can operate the PC and audience response system.



Planning and Preparing for a Facilitated Survey Session

Meticulous preparations will be necessary to ensure that everything runs smoothly during the actual facilitated survey session:

- Split the survey respondents into groups of ideally 30 or maximum 50 – larger groups become difficult to manage from a technology point of view (respondents struggling with keypads or keypads not working). Make sure that you have enough audience response keypads for the intended group sizes, and a couple of spares in case a keypad stops to work (usually due to a battery going flat).
- Prepare a PowerPoint presentation with all the survey questions that can be used during the facilitated survey sessions (see the attached example of such a presentation):
 - Make sure the PowerPoint presentation is linked to the audience response system and that its Excel interface has been properly configured (get the vendor to help if required).
 - Include an introduction section that contextualises the survey, and also a section where the audience can be instructed in the use of the audience response system – include a couple of sample test questions so the audience can experiment with the keypads.
 - Display the survey questions one by one in the same sequence than in the survey questionnaire.
 - If applicable and in line with the survey questionnaire, include questions where the respondents can specify their positions in the organisational structure and their demographic details (age, gender etc.)
- Test the audience response system before the time and check each individual keypad's battery level, and replace batteries where required.
- Setup the entire system (PC, video projector, audience response system) and rehearse the survey session a couple of times to make sure that the technology works properly, and make sure that an Excel file with the survey responses can be exported or created.
- Invite groups of employees to a particular facilitated survey session, taking care to emphasise that participation is voluntary and anonymous.



Conducting the Facilitated Survey Session

After all the preparations and rehearsals, conducting the actual facilitated survey session should be a breeze!

- On the day of the facilitated survey session, setup the entire system before the time and test it to make sure everything is working as advertised.
- Hand out keypads to each of the audience members – either as they arrive or afterwards when they are all seated. Do not write down their names or tick them off against a name list or related – that will jeopardise their anonymity and fuel the perception that their response will or can be linked to them. Besides, participating in an employee survey is supposed to be voluntary, so any lists of names will create the impression of checking up who is participating and who not.

- Start the PowerPoint presentation and get going with the session:
 - Introduce the survey to the audience – explain the purpose of the survey and what is to be achieved with it.
 - Emphasise that the survey will be anonymous, confidential and voluntary, so anyone is welcome to leave at any point in time.
 - Introduce the audience response keypads and explain to the audience how they work – do a test exercise with a couple of test questions (via PowerPoint) so they can get the feel of the keypads (see the attached example of a PowerPoint presentation).
 - Do the survey questions one by one, explaining the context of each question where necessary; allow enough time for all audience members to respond.
 - When done, thank the audience for their participation, inform them that management will provide the organisation with feedback regarding the outcomes of the survey, and collect the keypads.
- Important: after the session, make a copy of the response data on the PC (or the exported Excel file) and add a date or other identifier to the filename so you can identify the file at a later stage. This is particularly important if you are going to do more than one facilitated survey session – take care that you don't overwrite a previous session's response with new data!



Wrapping Up the Session

- Convert and/or restructure the audience response system's Excel response data into the required Excel import format as prescribed by Mindset Management.
- Email the correctly structured Excel survey response data to Mindset Management so the data can be imported and combined with the online survey responses of the rest of the organisation.
- Wait for the analytics dashboard to be made available!