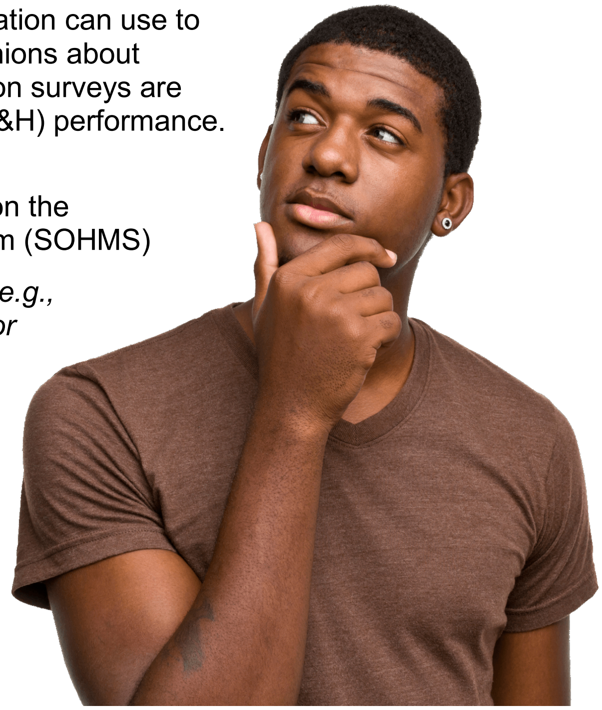
Getting Started with Employee Perception Surveys



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Perception surveys are measurement tools your organization can use to discover employee attitudes, thoughts, feelings, and opinions about different aspects of your organizational culture. Perception surveys are often underutilized when evaluating safety and health (S&H) performance. These surveys offer many benefits, such as:

- Allows employees to freely express their opinions on the safety and occupational health management system (SOHMS)
- Provides insight on past and current performance (*e.g., comparing where we were vs. where we are now for management's response to safety, morale, production values, safety improvements made*)
- Identifies factors adversely affecting the organization's S&H culture
- Pinpoints SOHMS components working well, those not meeting expectations, and components in need of additional improvement
- Differentiates between "what is said" versus "what is done" (*e.g., an organization has a near-miss reporting policy in place and believes employees report all near-misses; however, employees feel they do not or should not have to report all near-misses*)
- Confirms or detects organizational needs (*e.g., if a specific S&H initiative needs additional resources, modifications to policies and programs, reevaluations of risks*) and gathers ideas to solve areas of opportunity
- Establishes perception baselines of how employees view S&H across the organization.

Conducting a perception survey will help you gain feedback about your SOHMS, learn more about your employees, and see how employees perceive S&H at your organization. Whether you create your own S&H perception survey or use existing resources, it is important to establish and follow a defined process. This quick reference guide discusses the steps to conduct a S&H perception survey, provides information on creating your own survey, and lists some existing Service and Agency resources you may find beneficial.

Steps to Conduct a Perception Survey

STEP 1. PLAN

Planning is a critical part of the perception survey process. Your organization will benefit by establishing a survey committee, which generally includes S&H personnel, safety committee members, union representation, and a management representative.

Define survey goals. Determine the goal of the survey – what are you hoping to accomplish? For example, will this survey cover various aspects of S&H, or will it cover something more specific (*e.g., visible senior management involvement, workplace training, workplace hazards*)? Have this discussion early in the planning process. Ask your committee to review the survey goal and define the information to seek from the employees. Your leadership may have input on survey goals too.

Make a choice. Determine if you should create your own perception survey or use an existing Service or Agency survey. Review any Service or Agency survey to see if it aligns with your survey goals and intent. If not, it is best to create your own perception survey.

MAKE A CHOICE

Create your own perception survey

Pro: Flexibility in structuring questions to support your survey goals and information you want to collect

Con: Time-consuming

Continue with Step 2

Choose a Service or Agency perception survey

Pro: Ready-for-use surveys

Con: Questions might not align with your goals or information you want to collect

Continue with Step 3

Frame the details of the survey. During this step:

- Identify the target group of employees to receive the survey (*e.g., everyone, specific jobs only*)
- Determine the sample size and number of survey responses you need to make the results meaningful and representative of your targeted group
- Select a confidence level (CL), or the probability your survey results reflect the attitudes of your target group – 95% is standard
- Select a margin of error (MoE), which is a range, measured in a percentage, showing how much the results may vary based on how many people respond to the survey – 5% is standard
- Set timelines for survey completion and review
- Discuss anonymity and confidentiality, as these factors typically encourage employees to answer openly, without fear of reprimand
- Determine whether to incentivize employees for completing the survey
    - While not a requirement, incentives motivate employees to complete the survey and can increase the overall survey response rate

Step 2. Develop

Review these tips if you are creating your own perception survey or modifying an existing survey.

Write the background details for the survey. Refer to the planning process for this information. Explain the purpose of the survey, the process to maintain anonymity and confidentiality, and any incentives offered.

Identify the demographics to collect. Examples of demographics include gender, age, education level, employment status, number of years with the company, and department name. Demographic information helps identify survey result differences between groups of individuals (*e.g., older vs. younger workers, maintenance vs. shipping and receiving employees*). Be careful, as too many demographic-related questions may remove anonymity, and some employees will not feel comfortable providing this information. Consider leaving demographic information optional.

Determine types of survey questions/statements and response scales. There are several types of response scales available, and you need to determine which to use, as each offers advantages and disadvantages. Many organizations use a combination of scales. Popular response scales on perception surveys include:

Dichotomous Scales

	Yes	No
I know how to report a hazard	☐	☐

Open-Ended Questions

	Response
Name ways you are involved in S&H.	

Likert Scales

	Strongly Agree 5	Agree 4	Neither Agree nor Disagree 3	Disagree 2	Strongly Disagree 1
My immediate supervisor supports S&H	☐	☐	☐	☐	☐

Write survey questions/statements. Keep your survey questions short and simple – aim for 10–20 questions and a completion time of 10 minutes or less. Consider asking similar questions using different response scales to compare responses later.

Make sure the survey questions/statements are clear and understandable. Confirm the wording aligns with your employee's educational levels and reading levels.

Write directions to complete the survey. Explain how to complete the survey. Provide information on how to answer the questions (*your chosen response scales may warrant additional directions)*. Define the due date of the survey and how to submit it upon completion – this part doesn't have to be in writing but be sure to communicate it during the next step.

SURVEY QUESTION TIPS

- Spell out acronyms
- Define vague words and terminology and avoid technical jargon
- Avoid broad adjectives (*e.g., good, fair)* since broad adjectives can hold different meaning to each employee
- Avoid leading questions potentially steering the respondent towards a specific answer
- Ask one idea per question

Trial the survey. Conduct a trial to ensure distribution and survey completion goes smoothly, completion time is as expected, and personnel understand the questions and statements. Rework the survey based on feedback.

Step 3. Distribute

Decide how to distribute the survey. Determine how you will distribute the survey (*e.g., paper, electronic, both*). Each method has distinct advantages and disadvantages. Consider employee access to computers when making this decision.

	PAPER	ELECTRONIC
ADVANTAGES	• Can omit name on survey • Can submit at an anonymous location	• Employee comfort and ease when submitting • Easy to compile and review data
DISADVANTAGES	• May submit more than one survey • Takes time to manually compile data	• Technical or access issues • Decreased perception of employee anonymity/confidentiality

Choose who will distribute the survey. Ensure your employees view the responsible person(s) who distribute the survey as credible, respectable, and trustworthy individual(s). They announce the survey to the employees, convey information on how to complete the survey and the timeline to complete it, and distribute the survey to the target group of employees. Ask them to provide reminders to increase the response rate.

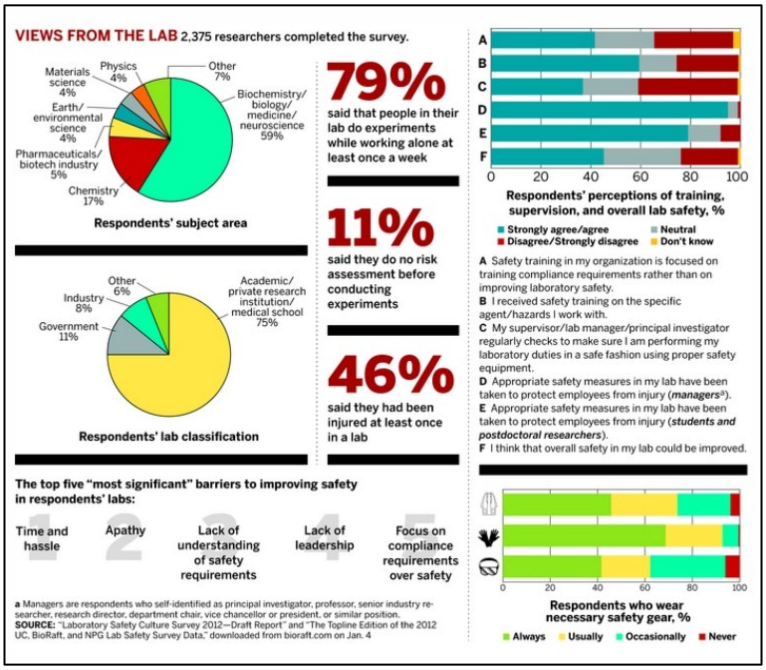
Step 4. Compile & Evaluate

Gather completed survey data. Begin to compile and review the received survey data.

Evaluate the sample size of submitted surveys. Use the CL and MoE information from the planning process to calculate receipt of enough surveys to accurately reflect your target group's attitudes, thoughts, feelings, and opinions. If you did not receive enough responses, you can still utilize the survey results, as they provide input and thoughts about S&H or your SOHMS. Investigate factors affecting the response rate to improve the next survey.

Example. *The workforce has 151 total employees. A CL of 95% CL and MoE of 5% requires 109 responses to have significant results. You received 117 surveys, which is more than 109. Therefore, you can claim meaningful results reflecting the attitudes, thoughts, feelings, and opinions of the population you sampled!*

Analyze the survey results. Many organizations use electronic means (*e.g., Microsoft Excel®*) to organize and analyze survey information. A survey software program or system may automatically analyze your data. Assess your results for perceptions of S&H in the data.



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Develop meaningful survey tabulations and display survey results. Use graphs, charts, and/or tables for visual presentation of the results. Never use a visual without explaining the data with text. Use a combination of visuals to display comparisons, a span of results, or even specific results related to different questions.

Share results with leadership. Prepare a survey report and present the results to leadership. Add a summary page to highlight the main findings and key items for improvement.

Communicate results to the workforce. Share a survey findings summary with employees to show the organization cares about employee S&H and are taking steps to recognize areas needing improvement.

STEP 5. ACT

Develop action plans. Create action plans to address areas needing improvement while also maintaining positive perceptions. You may need to address an employee perception, rather than an actual hazard or issue – so be ready to get creative (*e.g., employees believe it takes too long to correct hazards; however, your data shows your hazard corrects fall within required timeframes*). Action plans should include:

- A definition of the problem or focus area
- A brief description of the issue needing improved or perception needing maintained
- Goals and objectives following the SMART criteria (i.e., specific, measurable, attainable, realistic, and time-oriented)
- Resource needs
- Due dates for each action
- Person(s) responsible for each action

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Monitor and track plans of actions. Utilize a tracking system to monitor the progress of action plans. Schedule periodic progress meetings to review the status, timeliness, and progression of each action. Have each responsible person report on progress made, allowing them the opportunity to communicate challenges or additional resource needs. Follow up on all actions after implementation to ensure they are effective.

Step 6. Award

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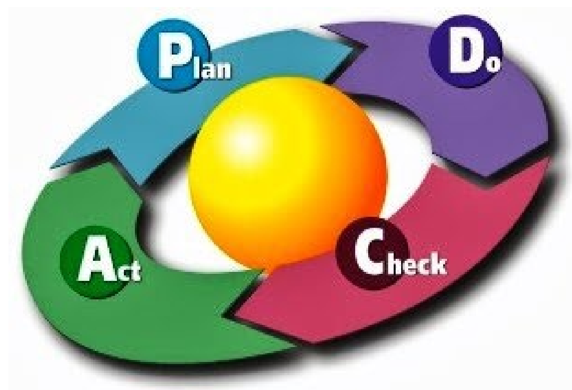
Award employees who complete the survey. If you tie the perception survey to your incentive program, provide incentives shortly after completion of the survey.

You want to award participation, not the outcome or results obtained from the survey. While you may not be able to award every individual who participated in the survey due to anonymity, you can award the entire group of targeted employees or the entire workforce. Distributing incentives shows the employees you value their opinions and appreciate their efforts for completing the survey.

Recognize employees called out in surveys. If you give the opportunity for employees to note an individual of significance within the survey (*e.g., those showing S&H excellence, a significant contributor to the SOHMS*) be sure to recognize those individuals. An example includes a simple appreciation during a morning meeting.

Step 7. Reassess



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Reassessing is an essential part of the survey process. Repeat surveys provide insight as to whether the S&H culture or responses and perceptions have stayed the same, improved, or fallen behind.

Redistribute the same, or similar, perception survey. Redistribute the survey in 6–18 months to reassess employee perceptions. For ease of comparison, keep the questions and ordering of the questions the same or similar. Explain the reason for conducting a repeat survey to employees.

Compare survey results. Analyze the new survey results using the same methodology. Compare the results of the past survey(s) to the current survey. Verify if actions plans effectively changed perceptions. Pay special attention to questions resulting in implemented action plans – did the action help change employee perceptions for the better? Develop or revise action plans as needed to address trends and undesired changes in employee perceptions.

The first time developing a S&H perception survey can be an overwhelming process. Following the steps outlined in this quick reference guide can help you overcome some challenges and obstacles you may encounter. Be prepared to receive surprising results – your survey may reveal employee perceptions that are not always evident. Remember to act on identified trends or undesirable perceptions to improve S&H across your organization.

For additional information on the SMCX's services, please visit the SMCX-hosted website at: https://www.smscx.org/.