

The Organizational Survey Planning CHECK LIST

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GENERAL:

What is your total population?
Do you do an entire census survey, or sample survey, or both?
How frequently do you survey?
What is your expected participation rate?
Do you use NCS scannable forms for everyone?
Does your process gain executive support, involvement and sustained attention after the survey?
Are executives held responsible for survey results and actions?
Is your survey based on critical success factors which are markers for strategic goals?
How important is it to ease the burden of information processing for your managers?
How important is it to ease the administrative burden on your survey operators and analysts?
Do you use survey results for senior exec performance goals, evaluations, merit increases, etc.?
Do you use a Steering Committee to guide the survey process?
Would you like to do interviews of executives, managers, or non-managers?
Would you like to do focus-groups of executives, managers, or non-managers?

THE QUESTIONNAIRE:

How many objective questions in the survey?
Any questions with unusual response sets or categories (non-Likert scales)?
Any verbatim comments and how many?
Who handles the printing and distribution of your questionnaires and answer sheets?
How many pages long is your usual questionnaire?
Who handles translations into the local language or dialect?
How many languages are represented by your questionnaires?
What is the process for getting local questions into the questionnaire?
At what organization level do you allow local items?
How many demographic questions are in the survey?
Is there any pressure for unique ethnocentrism of local questions?
Does your questionnaire cover union activities or union avoidance scales?

VERBATIMS (WRITTEN COMMENTS):

Do you require theme analysis of verbatims?
How do you handle data capture and data entry for verbatims?
At what level are reports generated for verbatims?
Do you edit for names, titles or foul language?
Do you need to enter verbatims in original language?
Do you need to translate verbatims?

STAFFING:

How many people are involved in running the survey process at the corporate staff?
How many people are involved in running the survey process in the business units?
How many people are involved in running the survey process in the countries?

ON-LINE ADMINISTRATION:

What is the level of computer literacy and PC availability in your organization?
Have you had any experience with PC-based or on-line survey systems?
How would you describe the state of enterprise networking in your organization?
Do all your organization's locations communicate via e-mail?
Do all your organization's locations communicate via fax?
Would you like to conduct your survey on a PC or on a network?

Would you like to conduct your survey on the INTERNET?
Would you like to conduct your survey on your INTRANET?
Would you like to use multiple modes of survey administration?

ADMINISTRATION:

How are survey questionnaires distributed within your organization?
How are survey questionnaires returned in your organization?

COMMUNICATION:

What are your communication efforts before, during and after the survey and where do they fit in ?
How do you garner support for the survey process among employees and top management?
Do you compile and distribute corporate-wide results to your employees?
Who assembles the corporate-wide results, and how do they do it?

TIME LINES:

What is the time line for questionnaire development?
What is the time line for distribution and administration?
What is the time line for questionnaire returns and data entry?
What is the time line for data cleanup and verification and testing of report output?
What is the time line for report generation and distribution?
What is the time line for management training?
What is the time line for feedback meetings?
What is the time line for analysis and reports to execs?
What is the time line for action planning?
What is the time line for survey process evaluation?

REPORTS:

How many reports are generated at the lowest work group level?
How many roll-up reports are generated at middle and higher levels?
How many reports are generated for the President/CEO and the direct reports?
Would you like to distribute your reports on paper (hard copy)?
Would you like to distribute printable files of your reports on diskettes?
Would you like to distribute interactive graphical reports on disk or CD?
Would you like survey results to be printed as soon as a work group completes their survey?
What kinds of comparison lines do you want on your survey reports?
How many history comparisons do you want to display?
In what format are historical data stored...are they accessible.....computed or raw data?
Is it important for you to use statistical tests of significance when you show group differences ?
Would your managers use an interactive report which guided their thought process and analysis?
Would executives use a diskette/CD-based reporting program to view their results?
Who sets up and maintains the organization structure documentation?
Who determines the report and organization specifications for the survey reports?
How do you handle last minute changes and reorganizations once administration is started?
How do you maintain continuity with history comparisons?
At what level of the organization do you maintain history comparisons?
What rules of reporting do you have to maintain confidentiality and anonymity?
How do you determine what data to include in a report?
How do you determine the format you will use in a report?
How many report formats do you use?
Do you distribute reports to unions or other third parties?

POST SURVEY CLEANUP:

How do you dispose of your raw data after the survey?
How do you dispose of your questionnaires/answer sheets after the survey?
How do you archive your data after the survey cycle?
How important is it for you to have 'hands on' possession of your raw data?
If your data were remote, but you had access to them, would that be alright?

POST SURVEY DEPLOYMENT:

What is more important: Managers analyzing their data or Managers focusing early on issues and actions?
What role do employees play in analysis, feedback, action planning, and evaluation?
What role do employee TEAMS play in analysis, feedback, action planning, and evaluation?
What is the accountability mechanism for your survey results and action planning?
Are business strategy sessions held with your executives either before or after the survey process?
Who trains your managers for survey analysis, feedback and action planning?
Would you use software that helps managers do survey analysis, feedback and action planning.
Do employees or employee teams need training in analysis, feedback and action planning?

SPECIAL ANALYSIS TOPICS:

Do you do any sampling and how do you do it?
Do you do any weighting of data based on sampling or on return rates?
How easy or difficult is it to use PC statistical tools for your analysts?
How easy or difficult is it to use a data base query tool, and who uses it?
Do you need advanced analyses: factor analysis, path analysis, regression, special research?
Do you need to execute special queries and reports on short notice?
Who produces your reports?
What software is used to analyze your data and produce your reports?
What equipment is used to process your data, conduct your analysis, and generate your reports?

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