Survey of Employee Engagement (SEE)
Administrative Guide

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Introduction:

Welcome to the Survey of Employee Engagement (SEE). We congratulate you for caring about your organization's culture and employee workplace satisfaction. The SEE is based upon extensive research conducted at The University of Texas at Austin through the Institute for Organizational Excellence (IOE) and focuses on the key drivers associated with employee engagement. The IOE has been conducting the SEE for the last 30 years and has continued to develop it to reflect the needs of today's workforce.

This Administrative Guide provides valuable information and detailed instructions for each step of the SEE assessment process. The following pages capture screen shots of web-based pages along with detailed instructions to assist you in completing the steps for the survey.

BEFORE WE BEGIN

Who Are the Key Players in This Process?

- **You and Your Organization**. Since you are reading this Guide, you are most likely the "**Liaison,**" or the person who has been entrusted with the responsibility for completing the setup information and identifying survey participants. Please know that you are not alone in this process. You are encouraged to ask others in your organization for input along the way.

- **Participants/Respondents**: These are the employees who complete the assessment questions.

- **The Institute for Organizational Effectiveness (IOE**) is a center at The University of Texas at Austin with a rich and long history of survey administration. IOE handles the technology end of the SEE. If you have questions, or need help with the survey, you will find a button on each page of the background information that allows you to contact IOE for assistance.

How is the Survey Organized?

Research confirms that there are several key drivers in organizations that effectively engage their employees. This survey instrument contains 48 items that capture demographic information of those that take the survey and evaluates 12 different constructs. These constructs include: Workgroup, Strategic, Supervision, Workplace, Community, Information Systems, Internal Communication, Pay, Benefits, Employee Development, Job Satisfaction, and Employee Engagement. An executive report and breakout reports (as applicable) will breakdown the overall responses of employees to these different constructs.

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When And How Will You Receive Your Report?

When your organization completes the Survey of Employee Engagement, you will receive a final Report that will assist you in understanding your workplace engagement practices. The report and its scoring system are computed by averaging the responses to the assessment statements from the participants who take the survey.

Another important feature of the SEE is the fact that your overall responses will be confidentially stored in our computer system. You will be able to monitor your progress overtime should you select to take the survey again at some point in the future. As our data collection grows, you will also be able to compare your organization with other similar groups.

Your report will be delivered to you electronically within a month of the final closing date.

In closing, we applaud your interest in the SEE. Effective employee engagement may is the *silver bullet* of organizational effectiveness, and without a sound strategy guiding your involvement of employees, you are significantly less likely to achieve your mission and advance your vision. The SEE provides a baseline to gage your engagement of employees and the resources that they offers you. We look forward to hearing about how you use this information.

Noel Landuyt, Ph.D.
Director
Institute for Organizational Excellence
www.survey.utexas.edu

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The Guide:

We strongly recommend that you read this Guide In its *entirety* before you begin completing the Survey of Employee Engagement! It contains important details and offers insights that will streamline the time you spend of completing the setup information.

A Glossary to Terms:

Liaison: Each participating organization has a single key user who serves as a **Liaison** between the Institute for Organizational Excellence (IOE) that administers the SEE, and your organization. The Liaison is the person who assumes responsibility for completing the background information and identifying survey participants.

The Liaison is encouraged to ask for help from others in your organization to provide the most accurate information.

Liaison Concierge: This is the online application that interfaces with the Liaison and the online application. The Liaison Concierge is a tool designed to help the Liaison in all aspects related to the SEE preparation, timeline, delivery, and reports.

Employees (or Participants): These are the individual that will take the SEE Assessment Instrument. As Liaison, you will be responsible for emailing the Survey office a spreadsheet with the required information. You will find more information about the respondents later on in this Guide.

Please Note:

You do **not** need to complete the entire process at one time. The Liaison Concierge saves the information as you move from section to section.

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Getting Started:

As you begin, there are two sections that need to be completed on the Liaison Concierge before distributing the SEE assessment. These sections are the “Initiate” and “Set Up” tabs that you can access via the home screen of the Liaison Concierge. Once these sections are complete, the assessment items can be sent to respondents that you designate.

The “Initiate” tab contains five sections:

1. Promote Participation
2. Survey Items
3. Timeline
4. Contact Information
5. Payment Information

The “Set Up”: tab contains five sections:

1. Organization Graphic
2. Additional Items
3. Category Codes
4. Employee List
5. Technical Support

So, you do not have to input it again, this information will be kept in the Liaison Concierge system so that you can monitor your practices over time as you continue to enhance and advance your employee engagement practices in the event you re-take the SEE.

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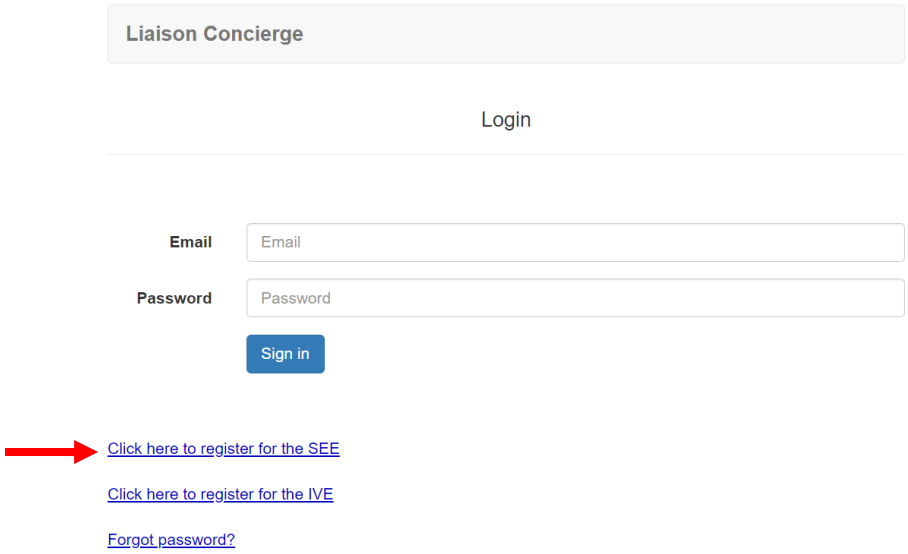
Accessing the Liaison Concierge:



To access the Concierge page, please go to https://www.orgexcel.net/c2 and "Click here to register!" You will need to register with the email we have on file for you. If you have already used this system before for a past survey, you can log in with the same credentials. You can select “forgot password” if you do not remember your log in information.

If you do not receive the email to reset your password or register, most likely your email security system has filtered out our email as spam. Provide the following information to your IT department to allow our emails to go through:

Our server Name = mailroom4.hostrocket.com
Our message subject = “Liaison Concierge: Password Reset”
Our domain = @orgexcel.net

If you still do not receive an email to reset your password, email the Survey office.

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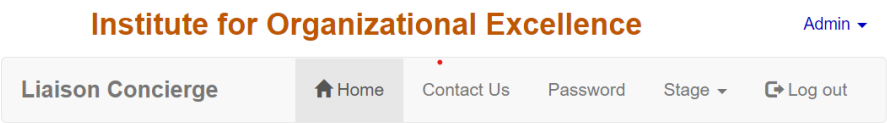
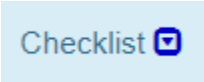
Navigating the Liaison Concierge

The Concierge is divided into 5 main sections. Initiate, Setup, In Progress, Reports, and Next Steps. Initiate and Setup will be used before your survey gets sent out, to set up your survey. In Progress will be used during the data collection period. Reports will contain a link to your final reports once completed. Next Steps will contain information on what to do with your reports. You can access these sections at any time through the Home screen (scroll to the bottom) or by selecting "Stage" from the options bar at the top of the main page.

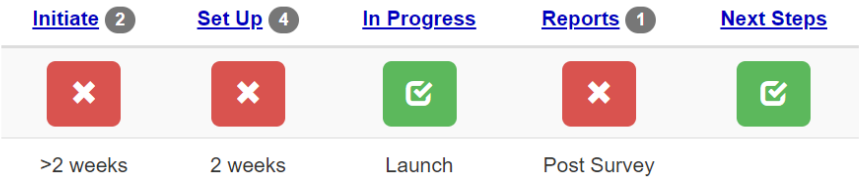


Tasks needed to be completed are listed under the navigation menu under a Checklist.



As described in the introductory section, as the liaison you will need to complete the "Initiate" and "Set Up" sections on the Liaison Concierge in order to complete the SEE. The Home page of the Liaison Concierge contains a great deal of information. You will need to scroll down to view all of it.

Towards the bottom of the list, you will find the five primary stages of the process: Initiate, Set Up, In Progress, Reporting, and Next Steps. Next to each Stage, in the dark circle, is the number of tasks that must be completed in that Stage. Each Stage and To Do action have a related icon. A Legend of the icons is provided at the bottom of the page.



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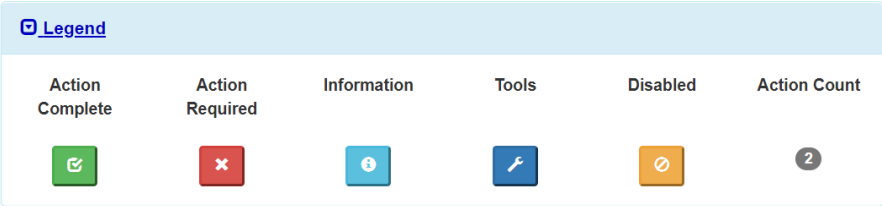
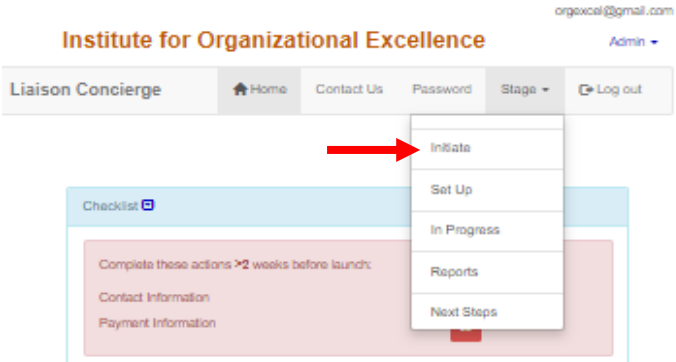


You can also access these items by selecting “Stage” at the top to the home page and select the stage you want to work on.



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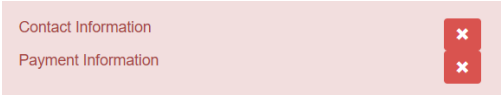
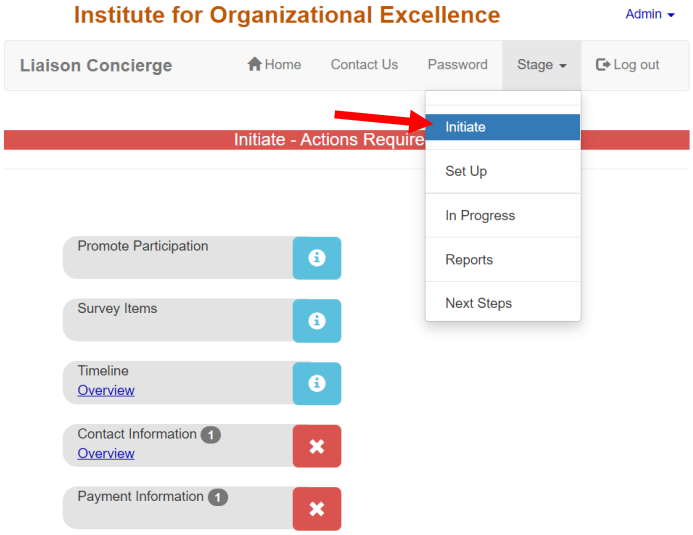
Initiate

This section is structured to prepare you for setting up your survey. It contains the following information:

- Promote Participation: How to promote your survey to your employees
- Survey Items: the items that will be on the survey
- Timeline: the expected timeline of the set up and distribution of the survey
- Contact Information: a place for you to list your current organizational contacts
- Payment Information: information needed to pay for survey services.

Contact Information and Payment Information are the only 2 items in this stage that REQUIRE action in order to start the survey. The other items are information and resources for you.





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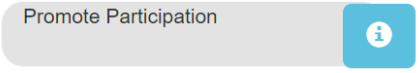
Initiate >> Promote Participation

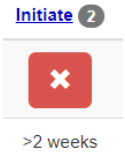


Purpose of promotion:

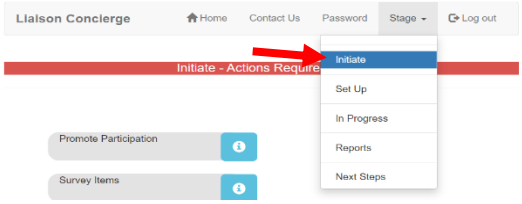
Promoting your survey is the best way to get buy in from employees taking the survey. Employees respond well when they have been notified by organizational leadership as to the upcoming Survey of Employee Engagement. This encouragement to participate can take many forms, most commonly, multimedia approaches. To reach as many people as possible, your marketing plan should consist of many different approaches.

There are two ways that you can get to the "Promote Participation" section from the home screen of the Liaison Concierge:

1. scroll to the bottom to the "Initiate" button. Click on the word "Initiate" or on the colored box directly below it. Then click on the colored box for the desired option.



2. Or navigate from the bar at the top of the home screen. Select "Stages," then select "Initiate." Then click on the colored box for the desired option.



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How to promote:

Marketing should begin at least one month prior to the survey launch date. Your marketing plan should include information of interest to employees and may include the following:

- What it hopes to accomplish (why you are doing it, goals for the survey)
- The dates for the survey
- Your goals for participation
- A link to and/or information about how the survey is anonymous (click here for link on anonymity of the survey)
- Who their agency liaison is and how to contact that person
- What to look out for when receiving their email from the Survey office (The subject line will be "Survey of Employee Engagement")
- How you plan on using the data once you receive the results

Engage internal partners by identifying and engaging departmental and/or regional contacts and working with internal departments, specifically HR and IT, to ensure that the survey is accessible and appropriate for all employees.

Before the survey, set goals. Common goals are: 100% employee participation, making the Survey accessible and available to all employees- includes creating a "safe" environment for employee participation, using consistent language and vocabulary about the Survey in management and staff meetings, producing and distributing creative and culturally competent communications and encouragement for all employees to participate, communicate to employees the reasons for taking the survey.

Before the survey decide on a theme and any special design elements (colors, logos, slogans, etc.) Some examples of past marketing plan themes: Time to be heard, Ticket (to being heard), "Put your two cents in", Don't Throw Away Your Opportunity to be Heard, Weigh In, What's on Your Mind, "Lets Keep Moving Forward" –Capital Metro, "What's your view?" –TRS, "How do we measure up?" –TEA, and Tell us what you think.

Before the survey, market to employees, supervisors and management through: email, newsletters, announcements at meetings, posted information on agency website, video clips, and posters or other publicity's.

During the survey, your organization may choose to do one or several of the following: Provide rooms or facilities to assist employees in completing the survey, provide a count to employees of your participation rate, provide a reminder to employees of the survey deadline via: email, newsletter, announcements at meetings, posted information on agency website, poster or other publicity.

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Templates for promotional materials:

- Emails:
  - Higher Education promotion email
  - Generic Promote Participation Sample Email
  - Generic Promote Participation Sample Email 2
  - Example Emails and Reminder Email
- Flyer:
  - Example 1
- Video:
  - Department of Health and Human Services: https://vimeo.com/680597456
  - SORM 2019 https://youtu.be/sblWL3c6NF4
  - DXDMV 2022 https://youtu.be/m4SOXB0sOYs
  - Sample script

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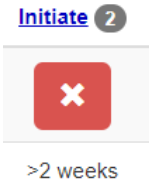
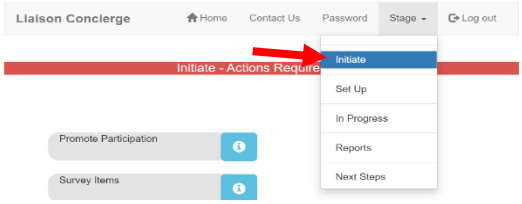
Initiate >> Survey Items

There are two ways that you can get to the "Survey Items" section from the home screen of the Liaison Concierge:

1. scroll to the bottom to the "Initiate" button. Click on the word "Initiate" or on the colored box directly below it. Then click on the colored box for the desired option.



2. Or navigate from the bar at the top of the home screen. Select "Stages," then select "Initiate." Then click on the colored box for the desired option.



Survey Items

This section contains information that will be asked on the standard SEE48 survey. The survey contains 48 items and takes about 15 minutes to complete. Survey participants can opt out of answering any question that they do not want to answer. These 48 questions cannot be modified.

- Link to constructs evaluated
- Link to current survey items
- Link to blank set up sheet
- Link to sample survey

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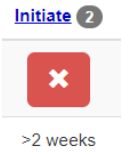
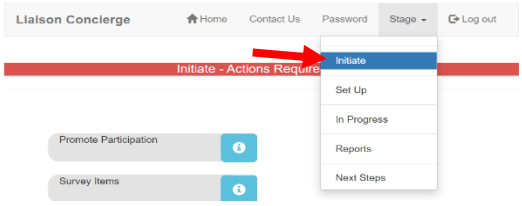
Initiate >> Timeline

There are two ways that you can get to the "Timeline" section from the home screen of the Liaison Concierge:

1. scroll to the bottom to the "Initiate" button. Click on the word "Initiate" or on the colored box directly below it. Then click on the colored box for the desired option.



2. Or navigate from the bar at the top of the home screen. Select "Stages," then select "Initiate." Then click on the colored box for the desired option.



Timeline

The timeline listed on the Concierge is created by the Survey office. Typically, the survey requires 6 weeks of set up time (this depends on customization and familiarity with the setup process), the survey will run for 3 weeks, and 2 reminders will be sent out during that timeframe. Notify the Survey office if you want to make adjustments to your timeline.

Event	Date	Status
Survey Starts	06/06/2022	☐
1st Reminder	06/13/2022	☐
2nd Reminder	06/20/2022	☐
3rd Reminder		☐
Survey Ends	06/24/2022	
Reports	07/24/2022	estimated`

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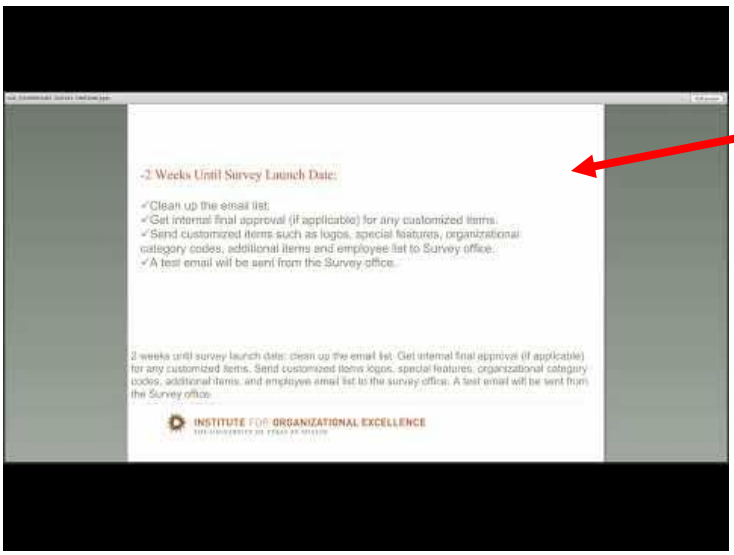

Click here to watch an instructional video on uploading your graphic

Or follow this link:
https://youtu.be/4qfjuxYKFmg

The following timeline can help guide you through the Survey process. The timeline is an approximation of the sequence of events that take place during the survey process and has been developed under the assumption that your organization has ample time resources. Your organization will need to personalize this timeline to meet your needs.

- ~6 weeks until survey launch date
  - Update contacts
  - Choose survey launch date
  - Notify the Survey office of any special services or reporting that your organization is needing.
  - Notify the Survey office if your distribution method will need to include hardcopy surveys.
  - Generate PO or initiate IAC
  - Construct employee list
  - Develop marketing plan
- ~4 weeks until survey launch date
  - Test employee email list (ensure all emails and information is correct).
  - Begin implementing marketing plan
  - Translate any materials into Spanish (if applicable)
  - If using hardcopies, send number needed to Survey office
- ~2 weeks until survey launch date
  - Email employee list to Survey office.
  - Get internal final approval (if applicable) for any customized items.
  - Upload logos, organizational category codes, and additional items to the Liaison Concierge.
  - Email videos (if applicable) to the Survey office

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- ~1 week until survey launch date
  - Survey office will email liaison a test email which will include a link to the survey via the survey email system.
  - Approve link or request changes.
  - Send email to employees announcing upcoming survey with information about what to look for on the Survey.
- Day of launch
  - Survey office will email invitations out.
  - Notify survey office of any problems.
- +1 week after survey launch date
  - Survey office will email reminders out to those who have not taken the survey.
  - Notify survey office of any problems.
- +2 weeks after survey launch date
  - Survey office will email reminders out to those who have not taken the survey.
  - Notify survey office of any problems.
- +3-4 weeks after survey launch date
  - Liaison notifies employees that the survey has closed (end of data collection).
  - Survey office request your final approval of information that goes on your reports, including your participant count, logo, contract information, and your organization name.
  - Send any changes to the Survey office.
- +4 Weeks after survey launch date
  - SEE hardcopy reports and electronic data sent to organization.
  - Invoice sent to organization with payment due in 30 days.
  - Notify employees/entire organization of participant count, demographic data, and high and low constructs.
- +1-2 months after survey launch date
  - SEE reports and electronic data sent to organization. The Survey office will return the reports through a secure file sharer, UTBox.
  - Invoice sent to organization with payment due in 30 days.
  - Notify employees/entire organization of participant count, demographic data, and high and low constructs.

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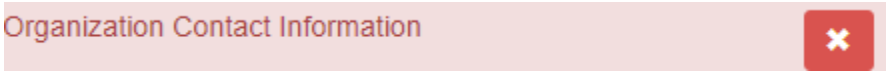
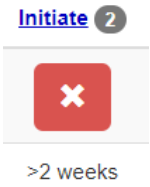
Initiate >> Contact Information

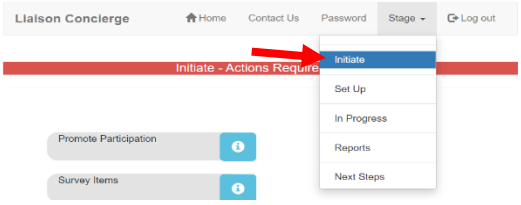
There are three ways that you can get to the "Organization Contact Information" section from the home screen of the Liaison Concierge:



1. Click the red "X" next to "Organization Contact Information", or
2. scroll to the bottom to the "Initiate" button. Click on the word "Initiate" or on the colored box directly below it. Then click on the colored box for the desired option.



3. Navigate from the bar at the top of the home screen. Select "Stages," then select "Initiate." Then click on the colored box for the desired option.



Contact Information

Collecting an organization's contact information is vital because the contact information will be printed on the report. Also, contact information provides a point of contact throughout the survey time frame. The survey liaison, they primary contact, is listed to reference who from the organization worked with the IOE office to conduct the survey.

Contact information should be collected from the head of the organization, survey liaison (contact information will be printed on the report) and board chair. Limited information will be printed on the survey report for the head of the organization and board chair. Limited information includes only first name, last name and title.

Additional contacts to include are a survey liaison assistant, financial contact (if same person as liaison please indicate) and IT (in case a technical issue arises in regard to the survey).

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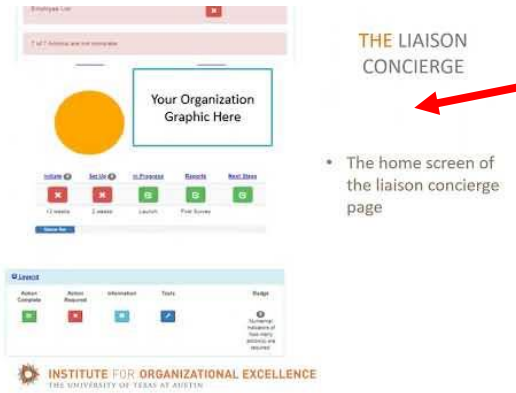
For each contact person provided indicate their first name, last name, position held within the organization, title, address, email address, and board of chairs must include the year of the end of their term.

Contact information is due to the survey office 6 weeks prior to the survey being sent out, or at the beginning of the survey set up process. Updates do this can be made later on, but notify the Survey office if you do so.



Click here to watch an instructional video on uploading your graphic

Or follow this link: https://youtu.be/F7Maray5dNM

To add a contact: click the "add contact" link and complete the form. The fields in red are required. On the bottom of this page, check the role of the person as the Liaison and/or Head of Organization. If the Liaison is a different person from the head of the organization, add that individual as well.

Set role(s) for contact ...

☐ **Liaison** ☐ **Head of Organization**

To edit a contact: click the email of the contact that you want to edit and make any necessary edits. Hit "Submit" at the bottom of the page.

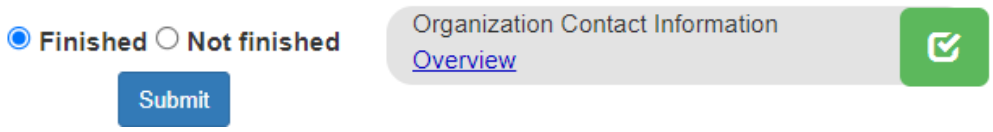
Add contact

Email	Name	Role	Pending edit
nlanduyt@hotmail.com	Noel Landuyt	Liaison	yes

The edits you made to this page must be approved by the IOE.

Any edits require IOE approval.

Hit "Submit" where you will be able to select "Finished" or "Not Finished" and submit the contacts to the IOE for review. Your edits will be "pending" until we verify that everything is correct in the system. Approval may take a few business days. Once completed the icon will change to a green check.



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Initiate >> Payment Information

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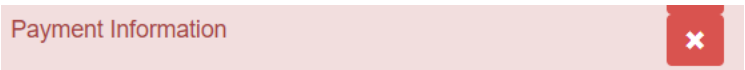
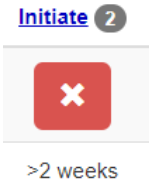
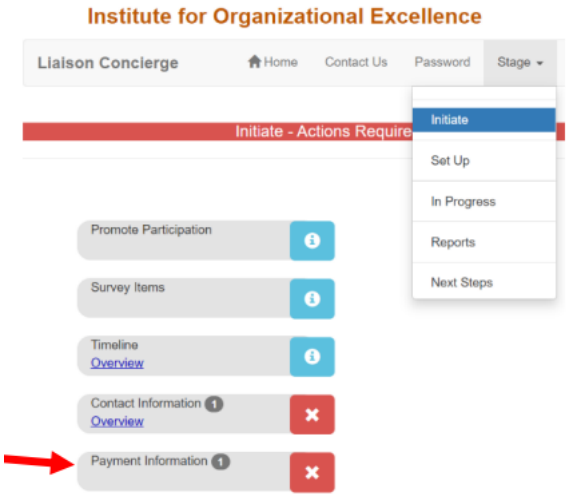


1. Click the red "X" next to "Payment Information", or
2. scroll to the bottom to the "Initiate" button. Click on the word "Initiate" or on the colored box directly below it. Then click on the colored box for the desired option.



3. Navigate from the bar at the top of the home screen. Select "Stages," then select "Initiate." Then click on the colored box for the desired option.



Please generate a PO for the cost of the survey and email it to orgexcel@utexas.edu – the information below can be used for the PO.

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Performing Agency:

The University of Texas at Austin

Office of the Associate Dean for Research

Employer ID #: 74-6000203 or TX VID #17460002037-309

Contact Information:

Inst. For Organizational Excellence

Attn: Noel Landuyt

1925 San Jacinto Blvd D3500

Austin, TX 78713

(512) 471-9831

nlanduyt@austin.utexas.edu

Terms:

Invoice is sent with the return of data reports and is deposited into LOCAL FUNDS and therefore a WARRANT must be issued (no ITVs).

Service Description:

The Performing Agency will survey the perceptions of employees regarding the organization's work environment and provide statistical analysis from the Survey of Employee Engagement. Data include a summary of responses for each item (mean, standard deviation, and frequency counts), a summary of the entire organization and pre-set organizational categories, a summary of respondent demographic data, display of comparative benchmarks, summarize items into construct areas, and both hard copy and electronic data reports.

The Basis for Calculating Reimbursable Cost

Calculations use base cost and estimated numbers of employees. Most organizations survey all benefit-eligible employees; however, this differs between organizations. This cost estimate is for all electronic and online assessment of employees. The use of hard copy surveys is an additional cost.

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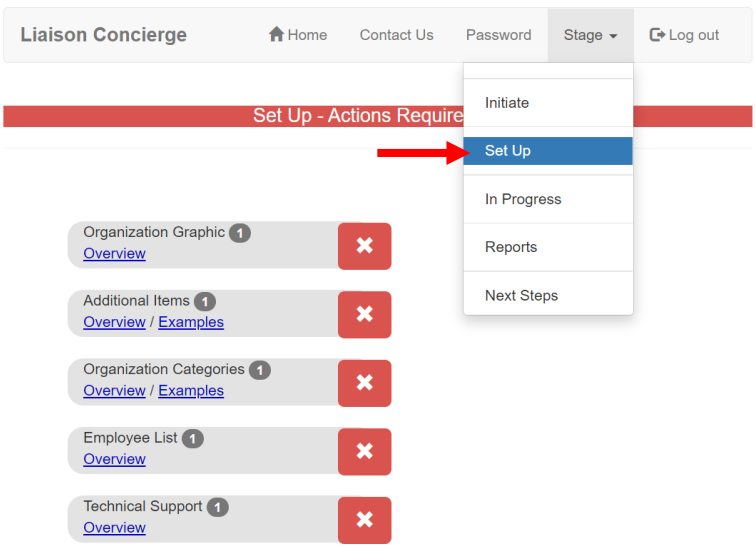
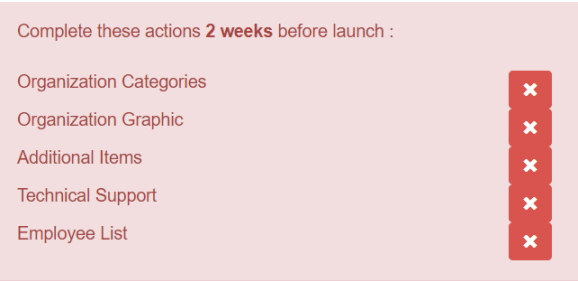
Setup

The Setup section is where all of the information for your survey will be inputted. It contains the following steps:

- Organizational Graphic: the graphic that will be displayed on the survey
- Additional Items: additional items to ask on the survey
- Organizational Category Codes: the category codes you chose to assign your employees (if applicable)
- Employee List: information on the employee list that is sent to the Survey office
- Technical Support: the required technical support

Setup information can be accessed by selecting Set Up from the navigation bar at the top of the page, or from the checklist on the homepage.





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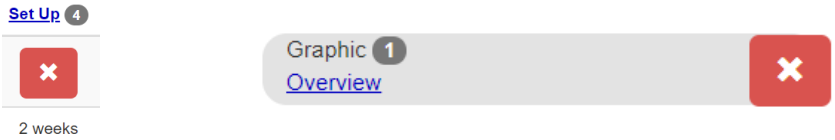
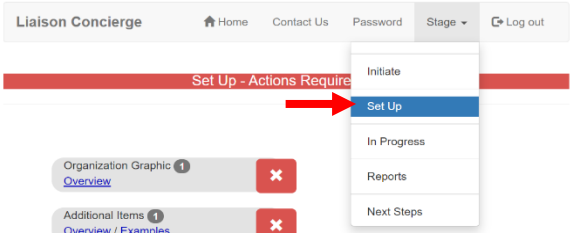
Setup >> Organization Graphic

There are three ways that you can get to the "Graphic" section from the home screen of the Liaison Concierge:

1. Click on the red "X" next to "Graphic". You will be taken directly to the page where you can upload your organization's graphic or,
2. Scroll to the bottom to the "Initiate" button. Click on the word "Initiate" or on the colored box directly below it. Then click on the colored box for the desired option.



3. Navigate from the bar at the top of the home screen. Select "Stages," then select "Setup." Then click on the colored box for the desired option.



Organization Graphic

You will be asked to upload your organization's graphic, which will be included in the final reports. This is typically your organization's logo.

Click here to watch an instructional video on uploading your graphic

Or follow this link: https://youtu.be/Utlr9aEc4fE

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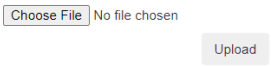
Once on the “Graphic” page, make sure that your graphic file meets the following specifications so that it uploads correctly:

- jpg or gif
- size <= 300 KB
- image resized on upload to 240 x 180

Use the “Choose File” to locate your image and then click “Upload”. The system will provide an error message if the file specifications are not acceptable.



Once you have uploaded your graphic, select “Finished” and click “Submit”.

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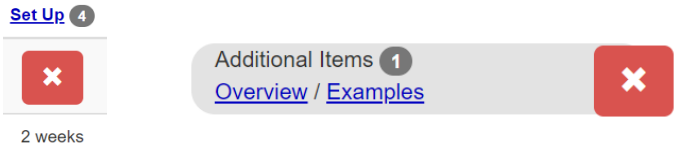
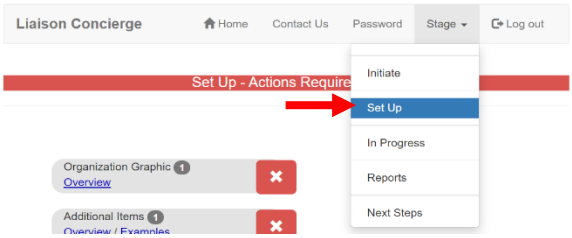
Setup >> Additional Items

There are three ways that you can get to the "Additional Items" section from the home screen of the Liaison Concierge:

1) Click on the red "X" next to "Additional Items". You will be taken directly to the page where you can add your organization's additional items or,
2) Scroll to the bottom to the "Set Up" button. Click on the word "Set Up" or on the colored box directly below it. Then click on the colored box for the desired option.



3) Navigate from the bar at the top of the home screen. Select "Stages," then select "Setup." Then click on the colored box for the desired option.



Additional Items

Additional items are survey items that address issues unique to your organization. They are displayed after the standard survey items. Additional items are optional to add, but you are encouraged to develop them to increase the utility of your survey and provide organizational specific data for use in evaluation and planning. You may add up to 20 additional items using our standard response scale. This section contains instructions on how to write additional items and example sets.

Additional items set a particular tone and communicate priorities. Items provide efficient means for the organization to gather information that maybe needed by various areas of interest to leadership. Any employee involvement in creating additional items may increase the likelihood of employee buy-in and survey participation.

Additional items come from your organization; the Institute for Organizational Excellence does not create additional items. There are multiple approaches when deciding who will develop the additional items. Some organizations solicit additional items from employee workgroups, managers of specific programs, or other leadership teams as a way to engage stakeholders in the survey process.

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Review and revise any past additional items. Decide which items should stay or be replaced. Before creating new items review the standard SEE to ensure that a similar item isn't already being used. Standard SEE items are available under the initiate tab on the liaison concierge page. Reviewing the SEE will also assist you in getting a feel for how items are written, which will help you in writing your own additional items.

Follow the guidelines in the "How to Write Additional Items" section of this presentation to assist you in creating new additional items if needed. After you've written your additional items, we recommend reviewing additional items with a small group to ensure clarity. Once you have reviewed the items, you can ask the Institute for Organizational Excellence to review them as well.

Submit the additional items at LEAST two weeks prior to the survey launch. You should do this two weeks prior to the survey being sent out in case you encounter any issues uploading the additional items and require our technical assistance. By doing this in advance, you can also verify that they are correct on the survey

Click here to watch an instructional video on uploading your graphic

Or follow this link: https://youtu.be/Utlr9aEc4fE

How to write additional items:

Keep in mind the following rules

1. **Scaling:** Keep in mind scaling. All items in the standard SEE use a five-point Likert scale that ranges from "Strongly Agree" to "Strongly Disagree" as well as an "N/A" option. Respondents can always leave the item blank. Additional Items need to be worded so that they can be responded to appropriately.
   - **Example:** "I receive timely and constructive feedback"

All additional items in the standard SEE should use this scale.

○ Strongly Agree ○ Agree ○ Neutral ○ Disagree ○ Strongly Disagree ○ N/A

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2. **Context:** When creating additional items keep in mind that the subjects addressed in the item will communicate to employees a sense of what is important to management, as well as organizational priorities.
   - **Example**: "We put into practice our organization's core values", sends a message to employees that the organizations core values are important.
3. **Phrasing:** Items must be phrased positively, negative phrasing or the use of double negatives is confusing for the respondent. Items should not be written in a leading fashion or as a question.
   - **Example** of a poorly written item: "Cultural diversity training has not made a difference in this organization." or "We are the most culturally diverse organization in this state."
   - **Example** of a better item is "Cultural diversity training assists in creating a more welcoming environment."
4. **Applicable to all Employees:** Ensure that all additional items are applicable to all employees. While a "Don't Know" or "N/A" is a response option for all participants to select, avoid additional items that exclude employees.
   - **Example:** "The accounting department effectively uses technology." If an employee is not part of the accounting department, they likely would not be able to answer this item.
5. **Easy to Understand:** Each employee should be able to respond to every item without any confusion. Avoid items that may be confusing and avoid the use of jargon, technical terms, and acronyms. Do not use slang or trendy statements.
   - **Example** of a poorly written item: "If you have direct contact with customers, our service is "best in class."
   - **Example** of a better item is "Our organization consistently delivers quality service."
6. **Watch Out for Double-Barreled Items:** Double-barreled items address two different issues in one item. Watch for the use of "and" in items. If two issues are addressed in one question, divide it into multiple items.
   - **Example** of a poorly written item: "Our departmental newsletter and casual Fridays have improved employee morale"
   - **Example** of a better item separates the two issues into separate items: "Our departmental newsletter has improved morale," and "Casual Fridays have improved morale."

Spanish translations: The standard SEE is already translated into Spanish if you require this option for some employees. However**,** you will need to translate any additional items to Spanish.

Examples:

- Link to Higher Education Additional Items
- Link to K-12 Additional Items
- Link to Government/Non-Profit Additional Items
- Link to Remote Work/COVID Additional Items
- Link to DE&I Additional Items

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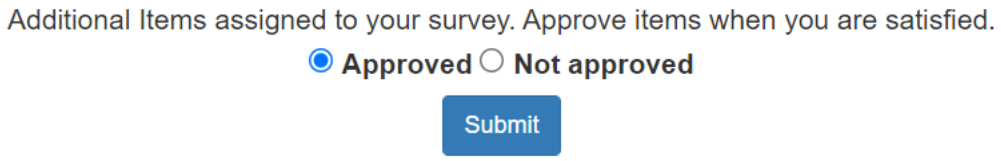
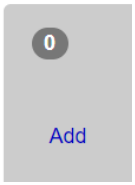
Adding Additional Items to the Concierge:

If you have done the survey in the past, your additional items will automatically be pulled into the most recent survey. However, you will need to approve them on the liaison concierge page. To approve the additional items, from the home screen, click on the additional items button. Ensure that approved is selected and click submit. Your additional items will be the same as the previous survey.

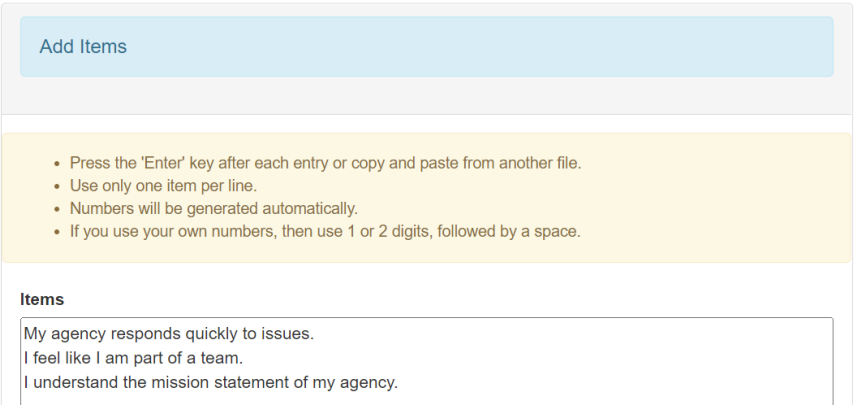


If you have new or updated additional items, follow these instructions:

1. Once you have navigated to the Additional Items, you will see an “Add” option. Click on this to add your new items.



2. Once in this page you will be able to add up to 20 additional items in the text box.
    a. Use only one item per line.
    b. Press the 'Enter' key after each entry or copy and paste from another file
    c. Numbers will generate automatically
    d. If you use your own numbers, then use 1 or 2 digits, followed by a space
    e. Once you have finished adding your items, click “submit”



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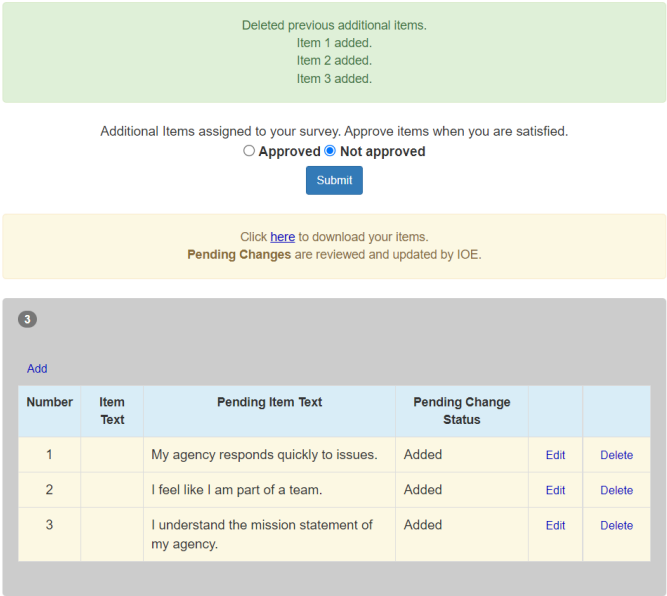
3. Once you upload your additional items, it will display on the screen and the “Not Approved” button will be marked. The additional item must be approved by the IOE before it indicates “Approved”. Give us a few days to approve your organization graphic. After we have approved your additional items, they will appear on the online survey.



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Setup >> Custom Surveys

For an additional cost, items can have custom scales.

- Yes or No questions:

  Example: "Would you like to receive a monthly newsletter?"

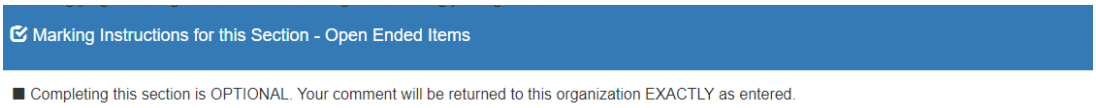
- Items using different scale words such as levels of satisfaction or certainty:

  Example: "How satisfied are you with the way you receive information from leadership?

○Strongly Satisfied	○ Satisfied	○Neutral	○Dissatisfied	○Strongly Dissatisfied	○N/A

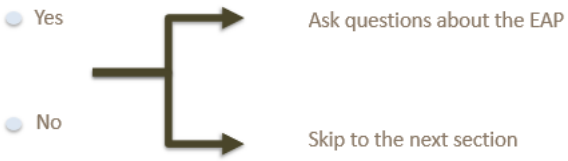
- Open-ended questions: Open-ended questions can be asked; however, employees will be made aware that by answering open-ended questions they are consenting to wave confidentiality if any illicit or inflammatory comments are made. Employee comments will be reported exactly as entered.

  Example: "How would you improve the method of communication?"



- Branching: For an additional cost, branching can be added to a survey. Branching is used to have respondents skip certain questions that are not relevant to them. This allows you to create different routes through your survey, guiding respondents based on their responses or profile.

  Example: You may have several questions about an employee action plan (EAP). If the first question is '*Do you participate in the employee action plan?*' and the respondent indicates "YES", they will see the EAP related questions. If respondent indicates *"NO:"*, then there is *no* reason to show that respondent the EAP related questions. That respondent will be skipped to the next section. This way the respondent sees fewer questions and has a greater chance of completing the survey



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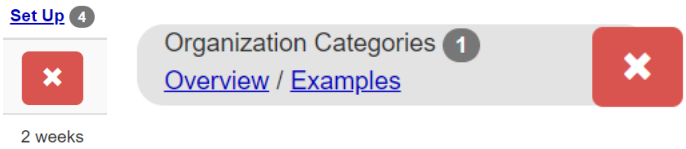
Setup >> Category Codes

There are 3 ways that you can get to the "Organization Categories" section from the home screen of the Liaison Concierge:

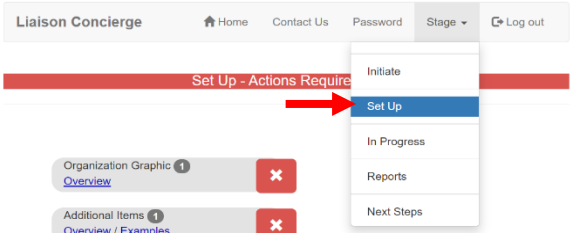
1. Click on the red "X" next to "Organization Categories". You will be taken directly to the page where you can add your organization's additional items or,

2. Scroll to the bottom to the "Set Up" button. Click on the word "Set Up" or on

the colored box directly below it. Then click on the colored box for the desired option.



3. Navigate from the bar at the top of the home screen. Select "Stages," then select "Setup." Then click on the colored box for the desired option.



Organizational Categories

Organizational categories are used to obtain a cross-sectional look within your organization through breaking out survey responses by areas. The category data provides a detailed analysis of specific work units such as divisions, programs, or other categories**.** Your organization may use up to three different types of organizational categories.

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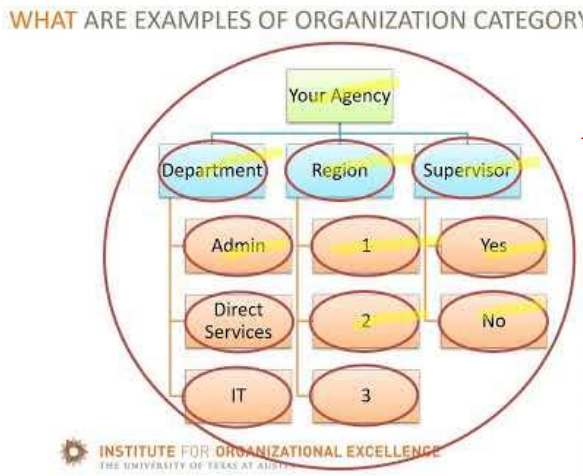


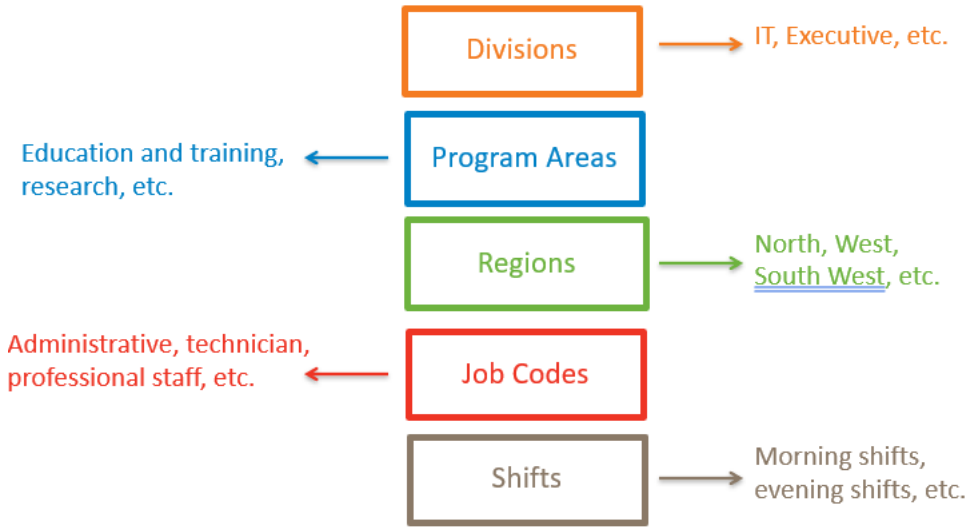
Click here to watch an instructional video on uploading your graphic

Or follow this link: https://youtu.be/YsN6v9ggaTQ

Organizational categories along with employee list are due to the survey office at least two weeks prior to the survey being sent out.

Determining categories:

When designing organizational categories use natural organizational breakouts. Common approaches include using your organizational chart and assigning each area as a separate category or using your cost centers such as divisions, program areas, regions, job codes, and shifts.



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Precoding:

Your organization has the option to precode your email list. This is the most common way to utilize organization categories. If you choose to precode, employees' are not prompted to select their own codes. Instead, you submit a breakdown of emails with each employees corresponding organizational category codes.

Precoding has numerous benefits:

- Employees do not have to self-select their codes
- Avoid selection confusion/error
- Assures employees are coded properly
- Although the survey is anonymous, employees selecting their organizational code may feel more identifiable

A note on precoding is that all of the coding needs to be done initially and sent as part of your email list. Given the brief survey administration timeline, it is important that email list be received by the survey office 2 weeks before the start of the survey.

If you choose to precode employees you will need to include their organizational category code on the excel email list provided to the survey office (for more information review the email list instructions).

A	B	C	D	E
Email	**First_Name**	**Last_Name**	**Org_Code_1**	**Org_Code_2**
joesmith@agency.com	Joe	Smith	Morning Shift	Far West

How to Create Category Codes:

To design organizational category codes begin by reviewing your previous organizational categories (if you have done a survey in the past). If revision is needed, decide who is going to create new organizational category codes.

1. **Easy to Understand:** If you are not using the precoding option, make the categories understandable and applicable to all employees. This increases the likelihood employees will choose the proper code. Without precoding, employees will be presented with a list of categories from a pull-down menu.
2. **Employees Per Category:** Ideally, there are at least 25 employees per response code. Typically, this allows for a sufficient number of employees to assure a report is generated. To ensure responses remain anonymous, employing organizations will not receive reports for categories that contain less than 5 people.
3. **Mutually Exclusive:** Codes should be mutually exclusive because employees can only be in one code per category. If the employee has a split job or shared responsibility, place them in what is considered to be their primary position.

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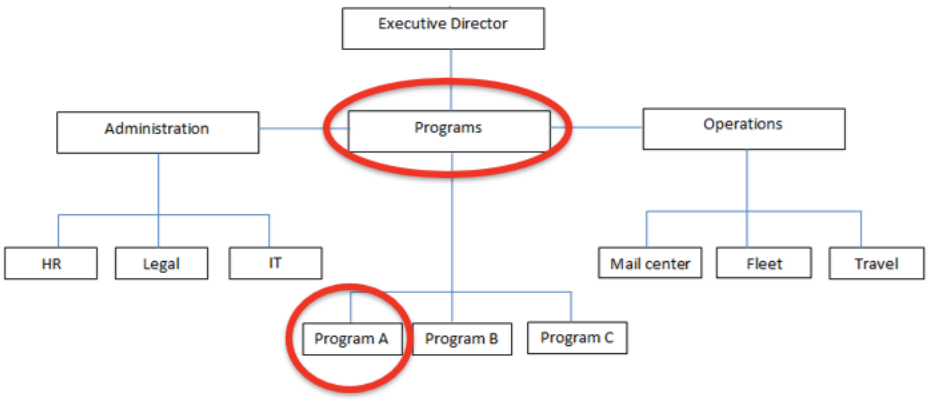
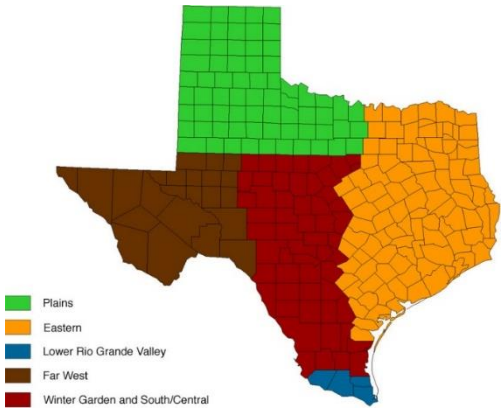
Examples

An organization chart can serve as a template to create organizational categories.

For example, employee Joe Smith in Program A would be coded in Programs, Program A, and be included with the results for the entire organization.



Organizational category codes can be assigned by regions. In the following example, Texas is broken into several different regions. If the employee in Program A, Joe Smith, worked in El Paso, he would be additionally coded under "Far West."



Organizational category codes can also include position held. If Joe Smith was also an administrative assistant under Program A, he would be coded under 1. Administrative Assistant, 2. Program A, 3. Programs, 5. Far West and be included in results for the entire organization.

Email	First_Name	Last_Name	Org_Code_1	Org_Code_2	Org_Code_3	Org_Code_4
joesmith@agency.com	Joe	Smith	Administrative Assitant	Program A	Programs	Far West

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Adding Categories to the Concierge:

Navigate to the Organization Category section as instructed above. If you have a survey in the past, your previous categories will be listed. If you have not done the survey before, or have not done category breakouts before, you will not see any categories.

Any changes you make to your categories will go to the “Pending Name” or “Pending Change Status.” Once the Survey office approves the change, the category will turn green and no longer say “pending.”

Category 1

8

Add

Code	Name	Pending Name	Pending Change Status		
111	Administration		-	Edit	Delete
112	Communication		-	Edit	Delete
113	Staff_Services		-	Edit	Delete
114	Licensing		-	Edit	Delete
115	Education		-	Edit	Delete
116	TREC_Enforcement		-	Edit	Delete
117	Information_Technology		-	Edit	Delete
118	TALCB_Enforcement		-	Edit	Delete

Category 2

0

Add

If you would like to add a category, select “Add”

- Press the 'Enter' key after each entry or copy and paste from another file.
- Use only one code per line.
- Code numbers will be generated automatically.
- If you use your own codes numbers, then use 3 digits, followed by a space.
- Click “Submit” once satisfied. You can always edit, delete, or add categories at a later time.

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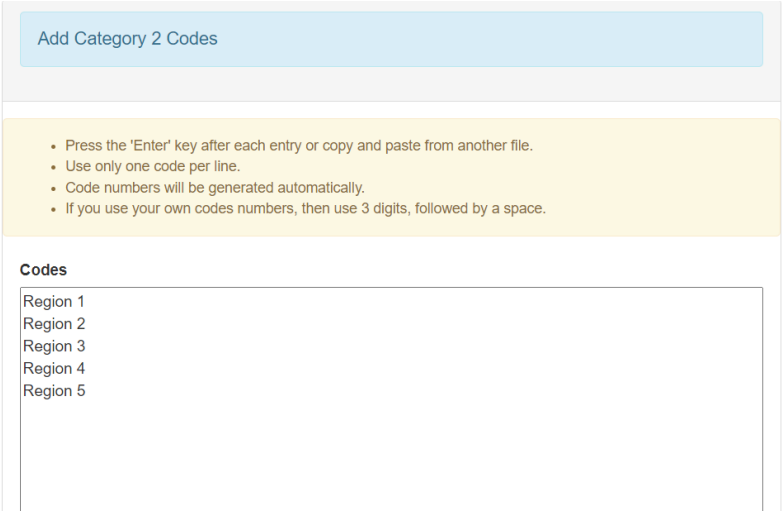
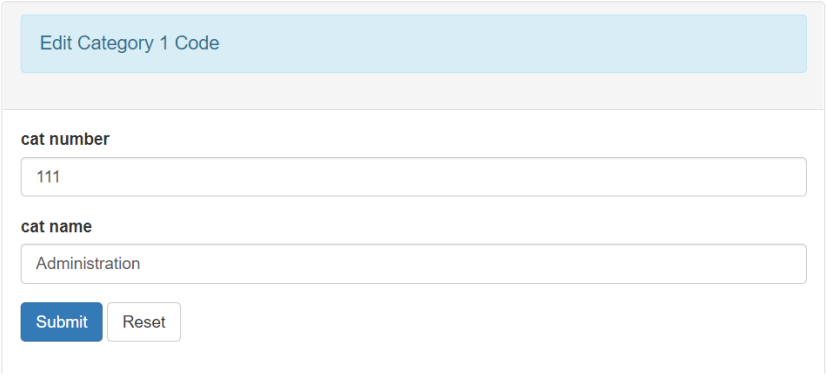
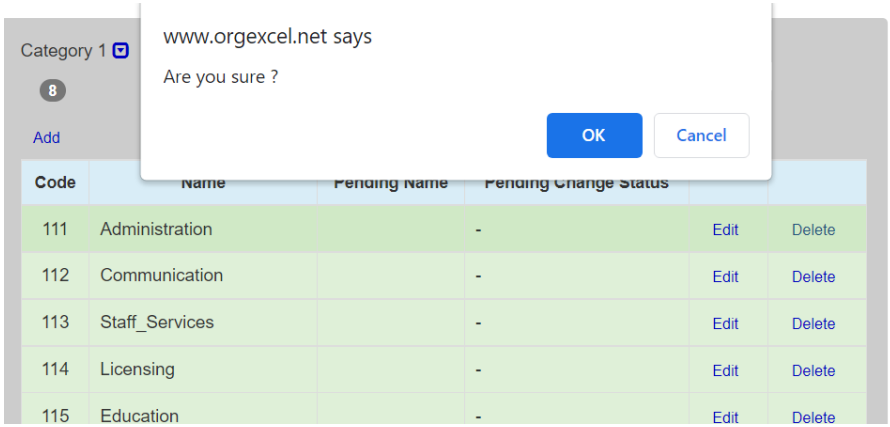


If you would like to edit a category, select “Edit.” Make the desired change and click “Submit.”



If you would like to delete a category, select “Delete.” Then click “OK.”



Once satisfied with your codes, select “Approved” and “Submit.”

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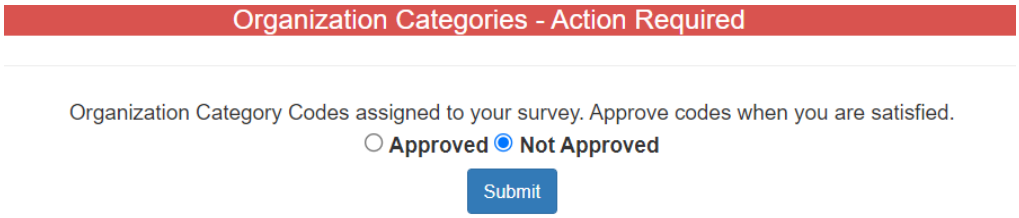

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Setup >> Employee List

Employee List

The employee list should be emailed to the Survey office at orgexcel@utexas.edu and should not be uploaded into the Concierge. This checklist item will get marked as completed once the Survey office uploads the email list they receive from you.

In order to facilitate survey distribution, each organization must submit an electronic list of all employees' names and their individual email at least 2 weeks before the start of the survey. In many cases, employee emails are accompanied by a set of organizational category codes. Your email list is handled in a strict confidential manner and the email list is not used beyond the scope of the survey.

Each employee receives a survey invitation. Each invitation is unique to that employee so that responses are categorized appropriately and that reminder emails are only sent to non-respondents. Therefore, Employees must not forward their link to anyone; this includes supervisors sending their link to their group.

Before the start of the survey, send a message to the employee list alerting employees of the upcoming survey. This will allow you to verify the accuracy of the emails and ensure that employees will see it in a timely manner. Given the brief survey administration timeline, it is important that email invitations reach employees as soon as possible.

WHAT ITEMS TO INCLUDE IN THE EMPLOYEE LIST

- Email
- First Name
- Last Name
- Respective Organizational Code(s) OC#

A	B	C	D	E
Email	First_Name	Last_Name	OC1	OC1_Text
john.doe@agency.gov	John	Doe	101	Enforcement

INSTITUTE FOR ORGANIZATIONAL EXCELLENCE
THE UNIVERSITY OF TEXAS AT AUSTIN

Click here to watch an instructional video on uploading your graphic

Or follow this link:
https://youtu.be/j5PlBxaol7A

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Email Rules:

1. Emails cannot be provided to the Survey office as a listserv or group distribution account.
2. Emails must be unique to each individual to ensure reliable and valid responses.
3. Be cautious about creating emails based on employee names. For example, Robert Smith could have either email: robert.smith@agency.org , bob.smith@agency.org, or robsmith@agency.org.
4. If your email system contains multiple emails for one individual select the employee's preferred email address.

Creating the Employee List

1. On a spreadsheet, provide each employee's email address, FIRST name, last name, and respective organizational code(s).
2. Construct the spreadsheet in this order:
    a. Email
    b. first name
    c. last name
    d. employee's respective category codes (do not put first name and last name in the same column).

A	B	C	D	E
Email	First_Name	Last_Name	OC1	OC1_Text
john.doe@agency.gov	John	Doe	101	Enforcement

3. Use these linked templates to create your employee list
    a. Employee list with categories
        - Employee list should be created on an excel or csv file
        - Use the following headers for your Employee List

EMAIL	FIRST_NAME	LAST_NAME	OC1	OC1_TEXT	OC2	OC2_TEXT

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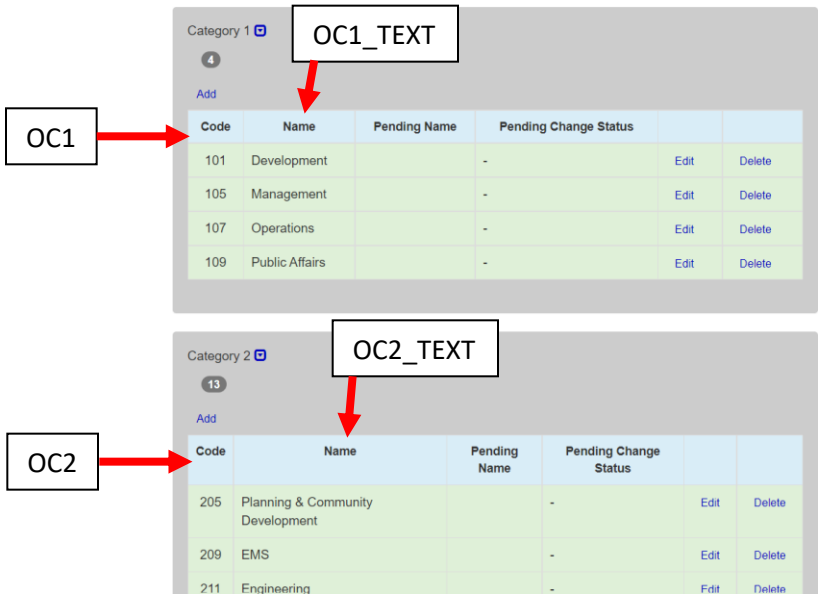
- Add categories depending on how many you are using. This example just has 2 categories, but if you are using more or less, add or subtract as needed. Categories proceed in numeric order.
- OC1 and OC2 are the numeric code assigned to each category. These numbers are automatically assigned once your categories are approved by the Survey office. You can find the codes for each of your categories by navigating to the "Organization Category" section. Instructions to navigate to this section are above.
- OC1_TEXT and OC2_TEXT are the lettered name of each category.



EMAIL	FIRST_NAME	LAST_NAME

b. These are the headers you can use if you did not precode your employees. Click here for an Employee list without categories

c. Click here for an example Employee List with categories Example Employee List

Spreadsheet Don'ts

1. On the employee list spreadsheet do NOT use the filter function
2. do NOT minimize or hide columns or rows
3. do NOT use color coding
4. do NOT skip rows or columns between groups of employees
5. do NOT use formulas in any of the cells
6. ENSURE that there are no spaces, semicolons, or quotes before or after employee email address
7. Do NOT use multiple worksheets to construct the employee list
8. Do NOT have multiple emails per employe

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Employees Without Email Addresses

There may be an additional cost to distribute surveys to employees without an email address. Regardless, of whether the employee has an email or not, their name still must be included in the employee list with the email field left blank.

In order for an employee without an email address to complete the survey, they can receive a letter, addressed to them with instructions on how to take the survey online (including a personal QR code). Or, they can receive a hardcopy survey with various options on how to return it to the Institute for Organizational Excellence.

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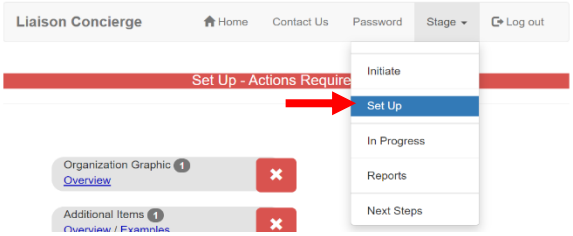
Setup >> Technical Support

There are three ways that you can get to the "Technical Support" section from the home screen of the Liaison Concierge:

1) Click on the red "X" next to "Technical Support", or
2) Scroll to the bottom to the "Setup" button. Click on the word "Setup" or on the colored box directly below it. Then click on the colored box for the desired option.

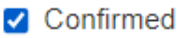
3) Navigate from the bar at the top of the home screen. Select "Stages," then select "Setup." Then click on the colored box for the desired option.



Technical Support

To ensure that participants can complete the SEE, you will be asked to confirm that your technology is compliant with the requirements below. Most of time, these technical requirements are not an issue. However, we want you to understand that non-compliance or firewalled systems may result in delays, user errors, and additional cost.

Once on the "Technical Support" page, you will be able to confirm your technical compliance by checking on the Confirmed boxes.



To confirm that the email server does not block us as spam, you can contact your IT department with the above information to confirm that we are whitelisted. Please remember that you can contact the IOE at orgexcel@utexas.edu if you need help with any of the sections above. We can also send you a sample email to verify that everything is working correctly.

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Confirm that your **participants**:

1. Have internet access.
2. Have unique email addresses.

Confirm that your **web browsers**:

1. Can connect to https://www.orgexcel.net/surveyspa?sc=144006
2. Have enabled JavaScript. Click to test.

If you are using **Internet Explorer 9** or older,
If you can't enable JavaScript for your organization,
then the survey redirects here.

Contact us if you have questions.

Confirm that your **email server** allows:

1. Email from host name:
   - esa10.utexas.iphmx.com (ip address: 216.71.150.156)
   - esa12.utexas.iphmx.com (ip address: 216.71.154.221)
2. Email address:
   - SEE_Survey1@austin.utexas.edu
   - soe10@austin.utexas.edu
   - soe14@austin.utexas.edu
   - soe18@austin.utexas.edu
3. Email name:
   - Institute for Organizational Excellence
4. An email body with embedded links and HTML.
5. Subject lines:
   - Survey of Employee Engagement
   - Reminder: Survey of Employee Engagement

Use host names because IP addresses can change without notice.
Use a wildcard for host name like "*.utexas.iphmx.com"

Contact us if you have questions or want to receive a sample email.

Once the above sections are confirmed, please select the boxes labeled "Confirmed" and select "Confirmed" at the top and click "Submit".

Technical Support
Overview

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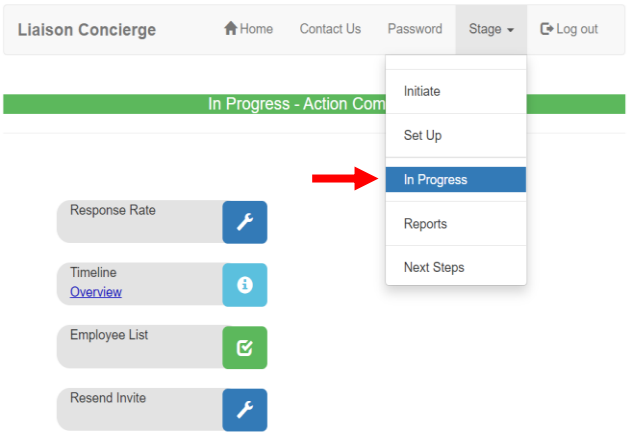
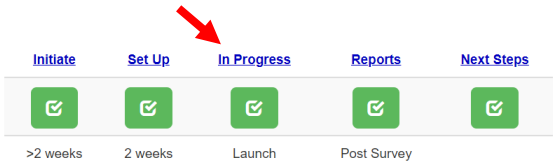
In Progress

This section is available once your survey has begun. It contains the following sections:

- Response Rate: this will show the overall response rate and breakdown of responses by category (if applicable).
- Timeline: an overview of when reminders will be sent
- Employee List: this is where you can add or edit participants or resend invitations
- Resend Invite: another place to resend invitations





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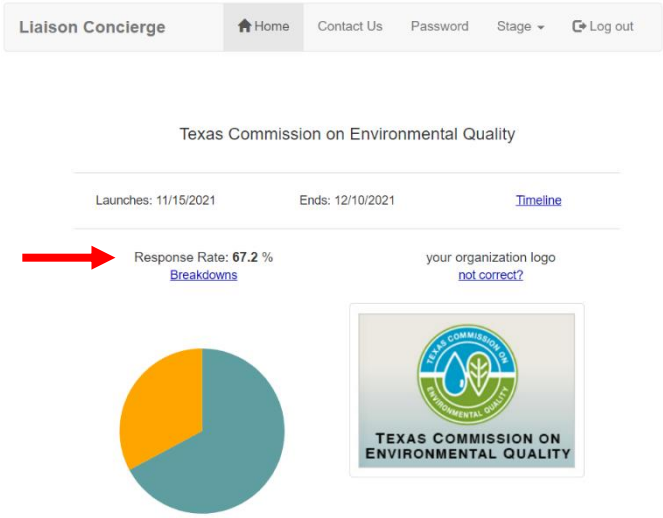
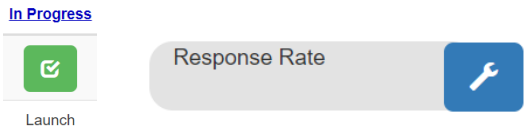
In Progress >> Response Rate

There are three ways that you can get to the "Response Rate" section from the home screen of the Liaison Concierge:

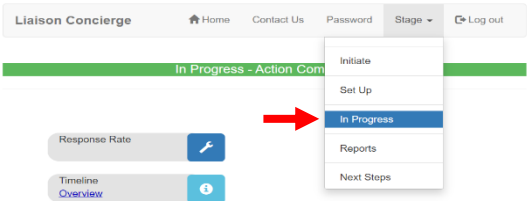
1) Now that your survey is up and running, your response rate is the first image listed on the Home screen. Select "Breakdowns" to see more detailed information.



2) Or scroll to the bottom to the "In Progress" button. Click on the word "In Progress" or on the colored box directly below it. Then click on the colored box for the desired option.



3) Navigate from the bar at the top of the home screen. Select "Stages," then select "In Progress." Then click on the colored box for the desired option.



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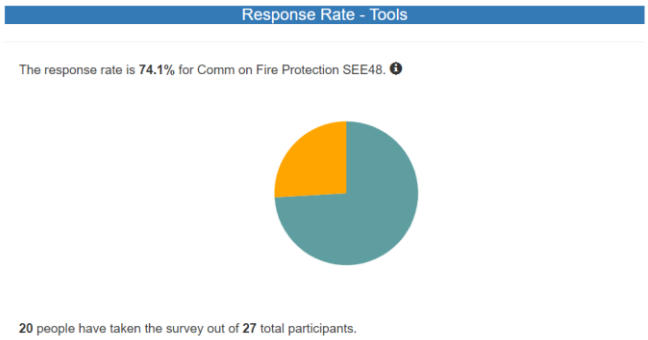
Response Rate

Your response rate will update as employees take the survey. The percentage is based on how many employees were provided on the employee list and the amount who have submitted the survey. Ideally, all response rates are higher than 65%. This ensures that the data collected on the survey is generalizable to your entire organization.

This section will show you how many people have taken the survey out of the total number sent the survey.



If you have pre-coded your employee list, you will also be shown a breakdown of how many people responded per category. If the category is yellow, that means less than 5 people have responded in that category. If the category is green, that means more than 5 people have responded in that category. If the category is red, that means no one has responded in that category. This breakdown table will also show how many people were coded into that category and how many have responded.

You can select "Download All Response Rates" and get a spreadsheet of the breakdowns of each category and its response rate.

1725 people have taken the survey out of **2568** total participants. Response rates by Organization Category Codes are below.

Download all Response Rates

Category Code 1

Code	Name	Completed Surveys	Total Surveys	Response Rate
111	Central Office	1324	1965	67.4%
112	Regional Office	401	603	66.5%

Category Code 2

Code	Name	Completed Surveys	Total Surveys	Response Rate
211	Office of the Commissioners	36	66	54.5%
212	Office of the Executive Director	5	9	55.6%
213	Intergovernmental Relations Division	Less than 5	8	***
214	Tox Risk Assmnt Research Div	18	19	94.7%
215	External Relations Division	26	43	60.5%
216	Sunset Review Division	7	8	87.5%
217	Office of Administrative Services (Deputy)	Less than 5	5	***

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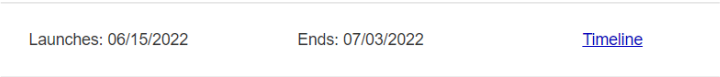
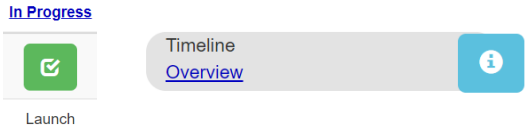
In Progress >> Timeline

There are three ways that you can get to the "Timeline" section from the home screen of the Liaison Concierge:

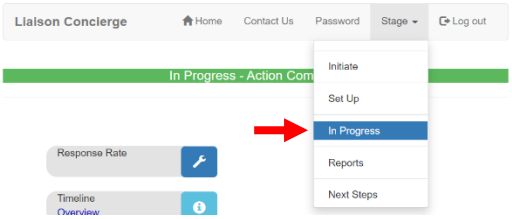
1) Now that you've started the survey, you can access your timeline from the home screen. Click on "Timeline."



2) Or, scroll to the bottom to the "In Progress" button. Click on the word "In Progress" or on the colored box directly below it. Then click on the colored box for the desired option.



3) Navigate from the bar at the top of the home screen. Select "Stages," then select "In Progress." Then click on the colored box for the desired option.



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Timeline

The timeline listed on the Concierge is created by the Survey office and is the same timeline listed under “Initiate”. Notify the Survey office if you want to adjust your timeline.

It is important to note here that the Survey Office can extend your survey if needed. While a minimum response rate of 65% is the goal, your organization may want higher than that. If you have not yet reached your ideal response rate by the end date listed on the timeline, contact the Survey Office and they will extend the end date. Typically, extensions are given on a week-to-week basis, but if your rate is low or you anticipate staff being out of the office for a period of time, you can request a longer extension. This is done at no additional cost, although this will prolong the projected time in which you will receive your reports.

Event	Date	Status
Survey Starts	06/06/2022	☐
1st Reminder	06/13/2022	☐
2nd Reminder	06/20/2022	☐
3rd Reminder		☐
Survey Ends	06/24/2022	
Reports	07/24/2022	estimated`

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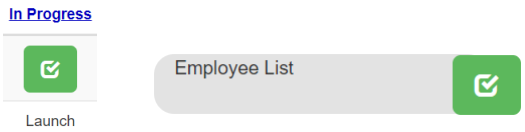
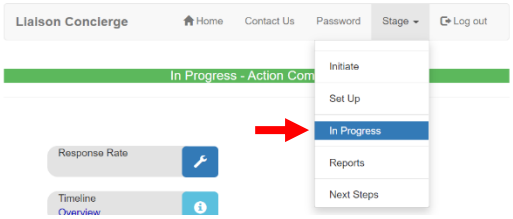
In Progress >> Employee List

There are two ways that you can get to the "Employee List" section from the home screen of the Liaison Concierge:

3) Scroll to the bottom to the "In Progress" button. Click on the word "In Progress" or on the colored box directly below it. Then click on the colored box for the desired option.



2) Navigate from the bar at the top of the home screen. Select "Stages," then select "In Progress." Then click on the colored box for the desired option.

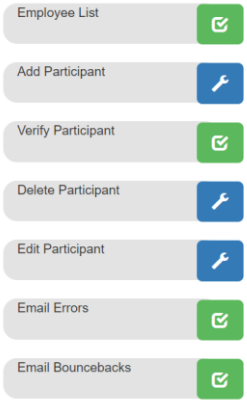


Employee List

This employee list section allows you to edit participants and resend invitations.

The "Employee List" section is where you can manage your participant list during the duration of the survey. You can:

- Access your Employee List
- Add a Participant
- Verify a Participant
- Delete a Participant
- Edit a Participant
- Correct Email Errors
- See Email Bounce-backs



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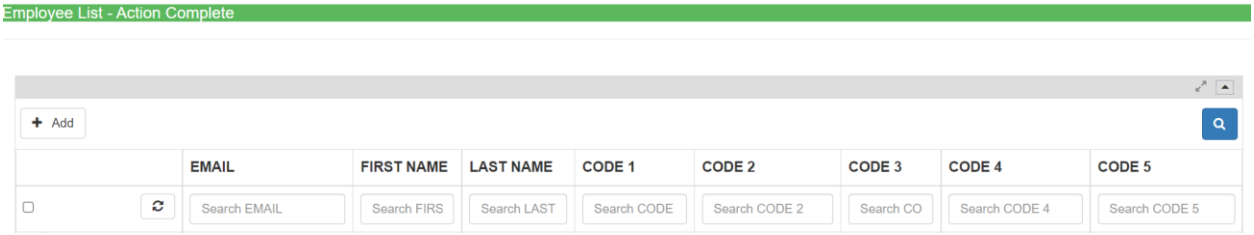
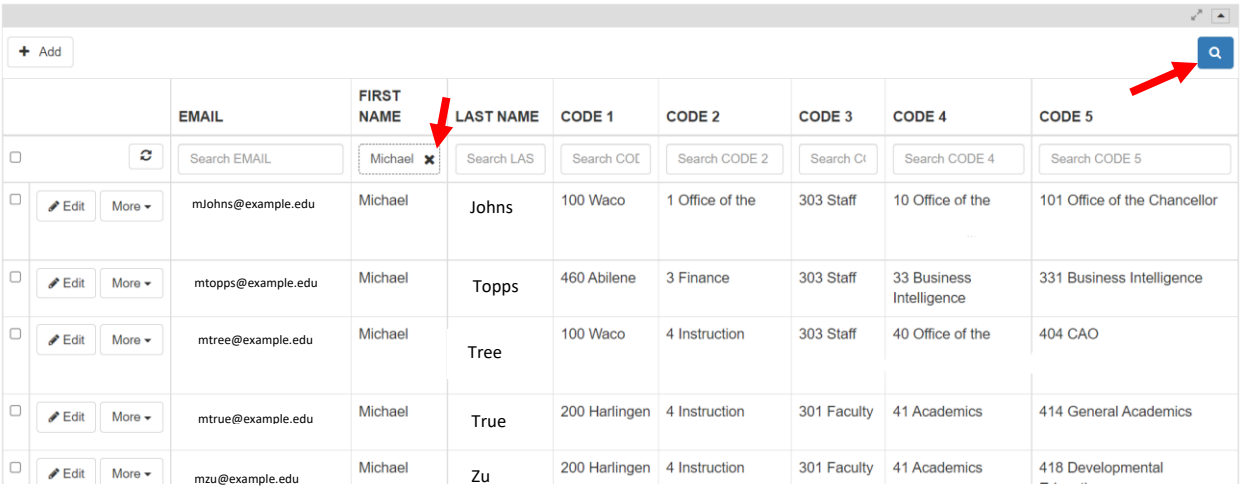
In Progress >> Employee List >> Employee List

This section allows you to add, edit, view, and delete a participant by using a search function. You can also resend a survey invitation from this spot. Selecting the "Employee List" While in the "Employee List" section will bring you to this screen:



To search for an employee, you can search by email, first name, last name, and category codes. The system will keep the email list filtered unless you clear the filter. The filter can be cleared be clicking the "X." In the example below, The list is filtered by employees with the first name Michael. To search by something else, or to be able to view your entire employee list, click on the "X" indicated by the red arrow.

You can also search for an employee using the search bar in the top right corner. 



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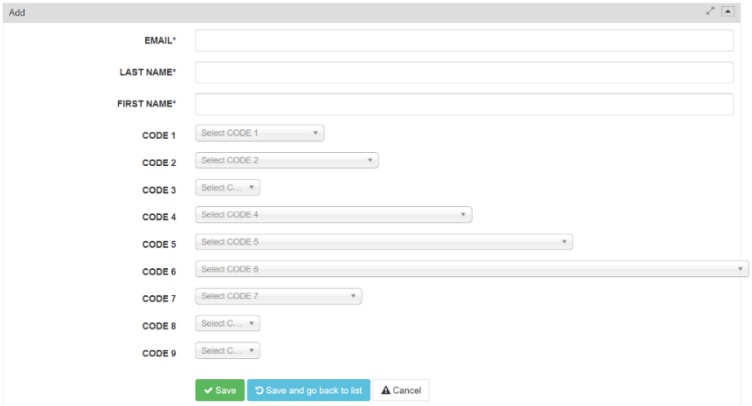
Add Participant

Sometimes, a new employee is onboarded after the finalized employee list has been sent to the survey office, or someone was accidentally left off the initial employee list.

To add a participant to from your employee list, click on “Add” in the top left hand corner of the page.

This will bring you to a page where you can add in the employee’s information. If you have precoded your employee list, make sure to add them into their proper categories. Click “Save” or “Save and go back to list” to add the employee.

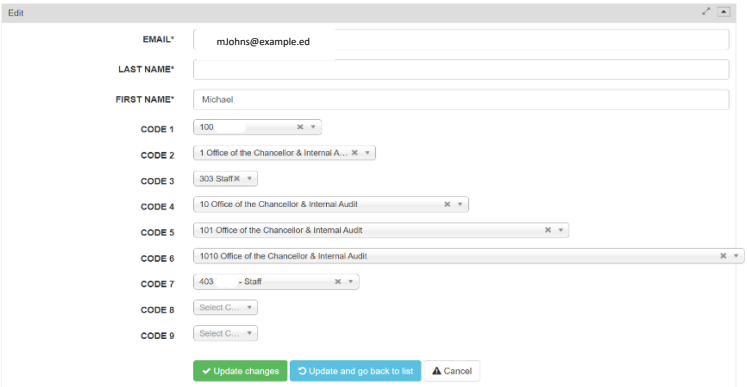


Sometimes an employee was incorrectly coded on the initial employee list, or they prefer a different email. When this happens, you can edit the participant’s information.

Edit Participant

To edit a participant already on your employee list, click “Edit”

Select “Update changes” or “Update and go back to list” to make the edit.



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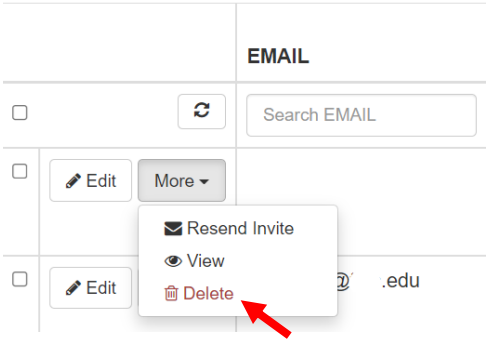
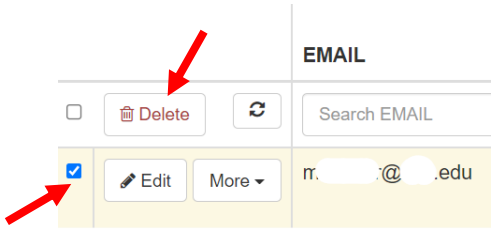
Delete Participant

In some cases, an employee may quit during the iteration of the survey. If you want to remove them from the employee list, there are 2 ways you can delete them.

1) Select “More” and then select “Delete.”

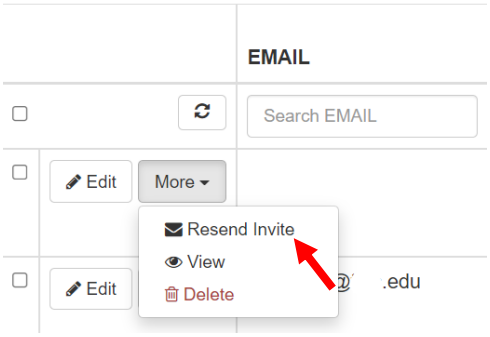


2) Or, click on the little box on the left side of “Edit.” This will bring up another “Delete” button you may select.



Resend Invite

In other cases, an employee may not be able to find the email that was sent to them. You can resend their survey to them. Select the drop down “More” and then select “Resent Invite.”



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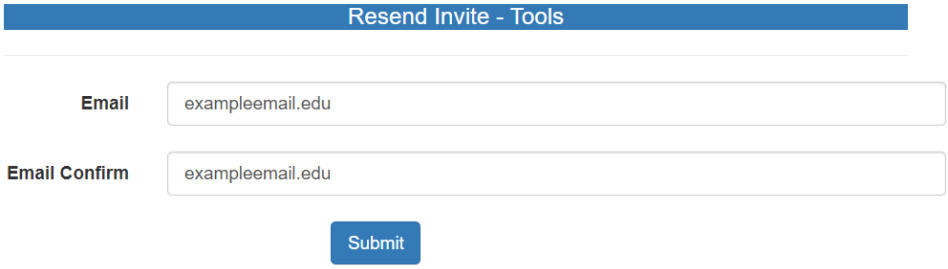
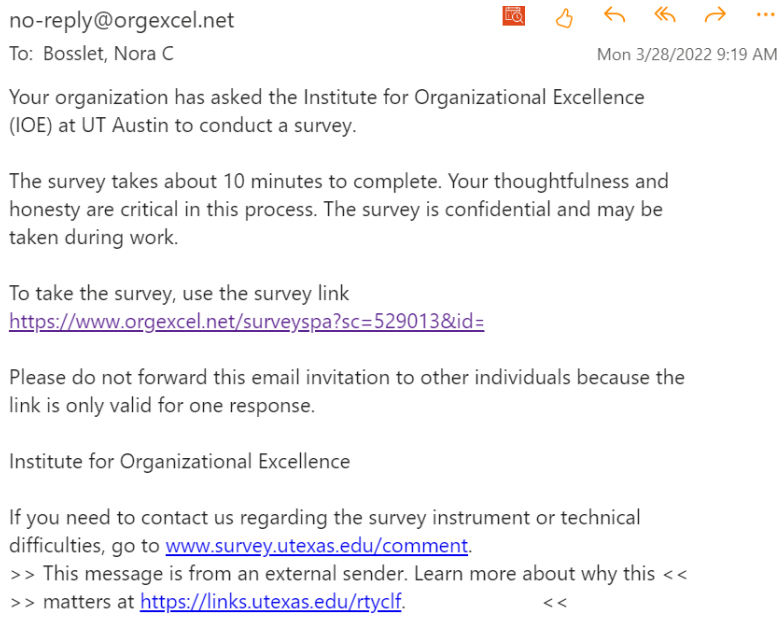
The employees email will automatically populate, you just click “submit.”



This is an example of what the email looks like that your employee will receive:



no-reply@orgexcel.net

To: Bosslet, Nora C

Mon 3/28/2022 9:19 AM

Your organization has asked the Institute for Organizational Excellence (IOE) at UT Austin to conduct a survey.

The survey takes about 10 minutes to complete. Your thoughtfulness and honesty are critical in this process. The survey is confidential and may be taken during work.

To take the survey, use the survey link
https://www.orgexcel.net/surveyspa?sc=529013&id=

Please do not forward this email invitation to other individuals because the link is only valid for one response.

Institute for Organizational Excellence

If you need to contact us regarding the survey instrument or technical difficulties, go to www.survey.utexas.edu/comment.
>> This message is from an external sender. Learn more about why this <<
>> matters at https://links.utexas.edu/rtyclf. <<

If the employee does not receive the email, double check the Setup Technical Support with your IT department to ensure that the employee’s email is able to receive our emails.

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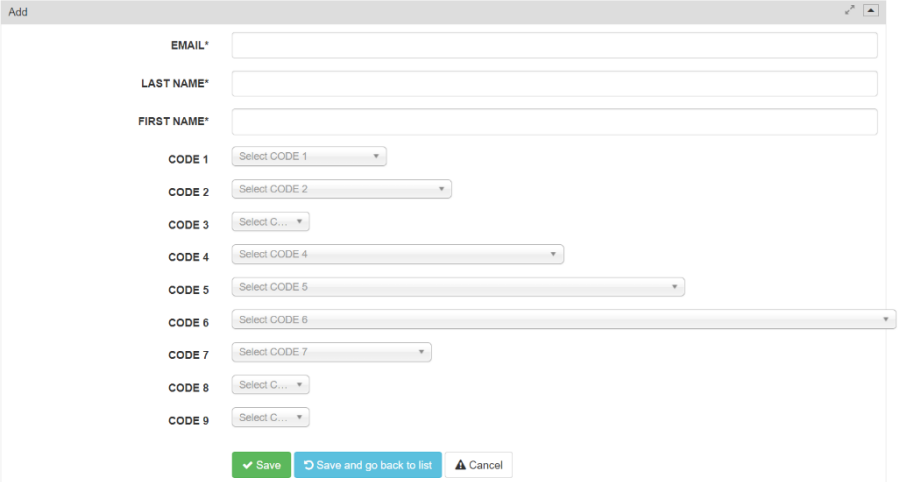
In Progress >> Employee List >> Add Participant

Add Participant

This section allows you to add a participant. To add a participant, click on the blue tool icon. This will bring you to a page where you can add in the employee's information. If you have precoded your employee list, make sure to add them into their proper categories. Click "Save" or "Save and go back to list" to add the employee.



You can also add a participant from the Employee List. Click here to learn how.

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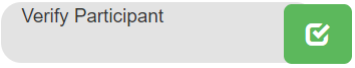
(i) In Progress >> Employee List >> Verify Participant



Verify Participant

In this section, you will verify the participation of Individuals who requested a survey link, but who were not in the original list. This may happen when an employee has trouble with their access code on the survey. From the landing page of the survey, participants can get "help" if they are unable to access their survey. If they're unable to find themselves using their email, they can opt to be added to the survey. This may be an employee who is using a different email but is already on the employee list, or this may be an employee who was left off the employee list. You will identify or delete the individual.

If you have a participant to verify, the red "X" box will be next to this item and a number will indicate how many participants need to be verified.

If the box is green, you have no participants to verify.

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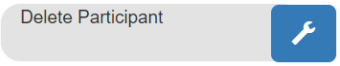
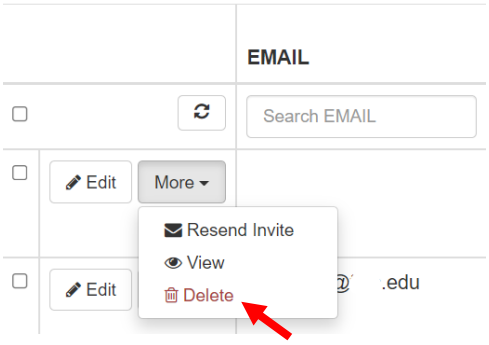
In Progress >> Employee List >> Delete Participant



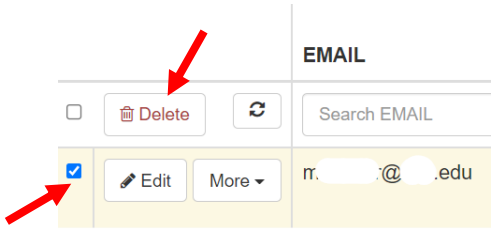
Delete Participant

In some cases, an employee may quit during the iteration of the survey. If you want to remove them from the employee list, there are 2 ways you can delete them. First, click on the blue tool icon. This will take you to the Employee List page. Then,

1) Select “More” and then select “Delete.”



2) Or, click on the little box on the left side of “Edit.” This will bring up another “Delete” button you may select.



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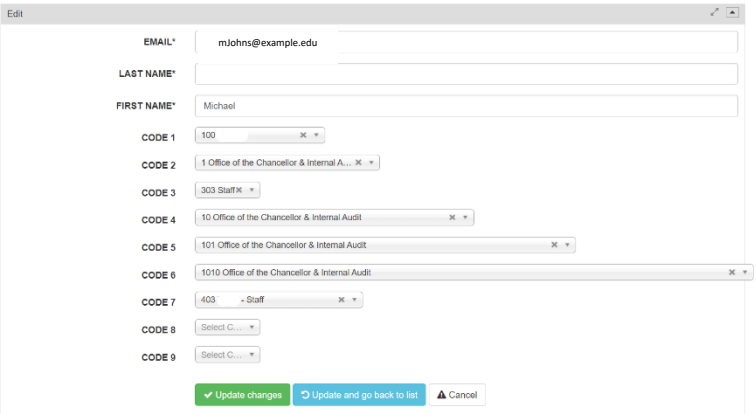
(ii) In Progress >> Employee List >> Edit Participant

Edit Participant

Sometimes an employee was incorrectly coded on the initial employee list, or they prefer a different email. When this happens, you can edit the participant's information. Click on the blue tool icon. You will be taken to the Employee List page.

To edit a participant already on your employee list, click "Edit"

Select "Update changes" or "Update and go back to list" to make the edit.



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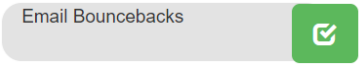
In Progress >> Employee List >> Email Errors

Email Errors

You will not need this section, unless otherwise instructed by a staff person in the Survey Office.

In Progress >> Employee List >> Email Bouncebacks



Email Bouncebacks

You will not need this section, unless otherwise instructed by a staff person in the Survey Office.

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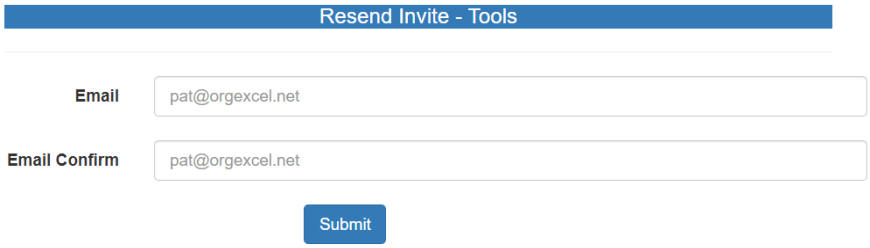
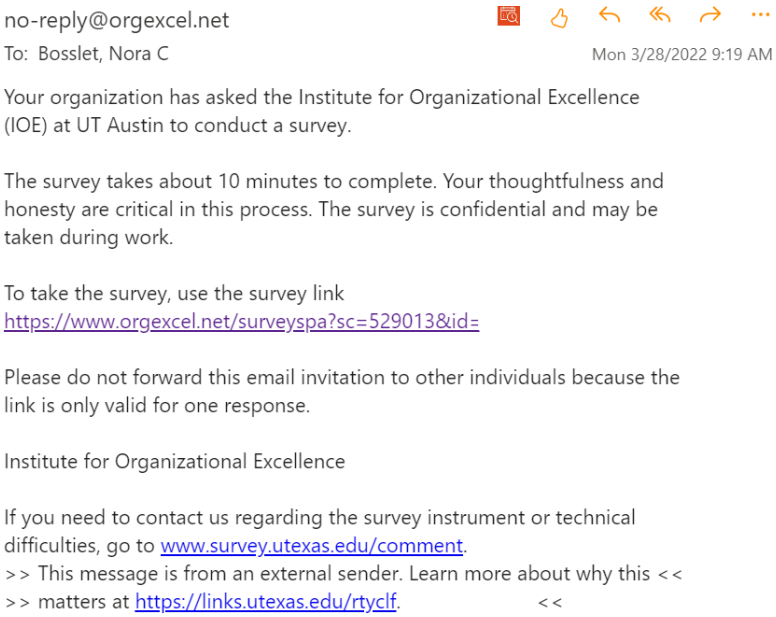
In Progress >> Resend Invite

Resend Invite

This section allows you to send an email with a survey invitation to an employee who is unable to find their email from the Survey Office or who you'd like to send a reminder to. Just enter their email address and confirm their email address and click "Submit" to resend a survey email.



This is an example of what the email looks like that your employee will receive:



If the employee does not receive the email, double check Setup Technical Support section with your IT department to ensure that the employee's email is able to receive our emails.

Emails can also be resent from the "Employee List" tab.

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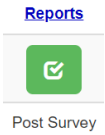
Reports

Executive Summary

There are two ways that you can get to the "Executive Summary" section from the home screen of the Liaison Concierge:

1. scroll to the bottom to the "Reports" button. Click on the word "Reports" or on the colored box directly below it. Then click on the colored box for the desired option.



2. Or navigate from the bar at the top of the home screen. Select "Stages," then select "Reports." Then click on the colored box for the desired option.

Executive Summary

Click here to download a Sample Executive Summary.

Click here to watch an instructional video on understanding your report

Or follow this link: https://youtu.be/6u9fblGUK-E

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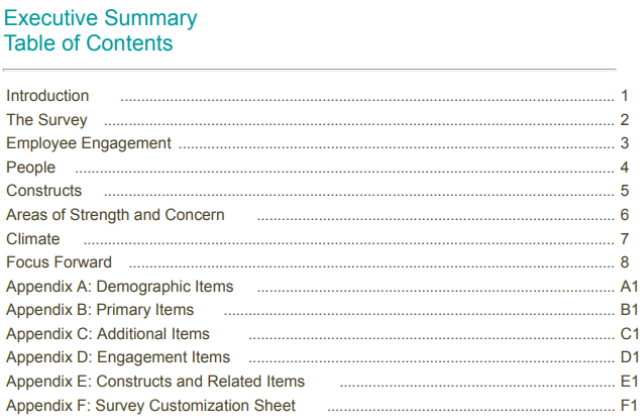
Executive Summary >> Table of Contents

The executive summary includes the following:

- Introduction: Overview of report, organizational profile
- The Survey: Overview of survey tool and survey constructs
- Employee Engagement: Breakdown of overall engagement rating, response rate, and levels of engagement
- People: Demographic breakdown of agency
- Constructs: Breakdown of constructs and scoring
- Areas of Strengths and Concerns: Breakdown of best scores and lows
- Climate: Overview of items measuring organizational climate
- Focus Forward: Suggested timeline after the results
- Demographic items: Detailed breakdown of the demographics of survey participants
- Primary items: Overview of scores for items
- Additional Items: Scoring of your additional items
- Engagement Items: Scoring of items related to measuring Engagement
- Constructs and Related Items: Scoring of constructs and the items related to each construct
- Survey Customization Sheet: A list of organizational categories and additional items used



Executive Summary
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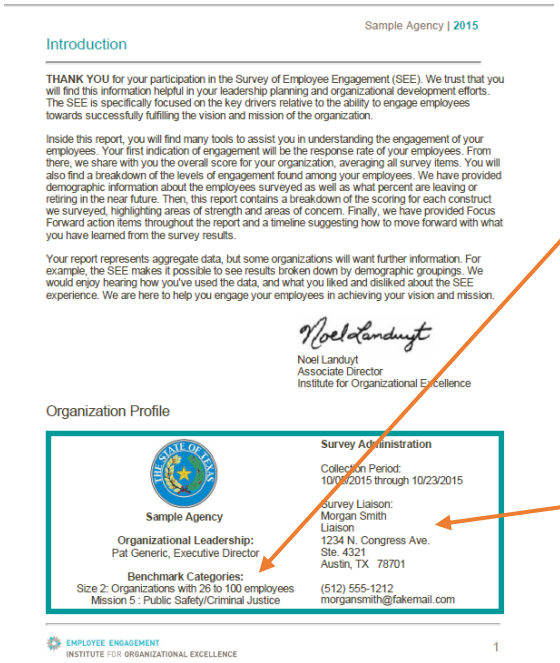
Executive Summary >> Introduction



Sample Agency | 2015

Introduction

THANK YOU for your participation in the Survey of Employee Engagement (SEE). We trust that you will find this information helpful in your leadership planning and organizational development efforts. The SEE is specifically focused on the key drivers relative to the ability to engage employees towards successfully fulfilling the vision and mission of the organization.

Inside this report, you will find many tools to assist you in understanding the engagement of your employees. Your first indication of engagement will be the response rate of your employees. From there, we share with you the overall score for your organization, averaging all survey items. You will also find a breakdown of the levels of engagement found among your employees. We have provided demographic information about the employees surveyed as well as what percent are leaving or retiring in the near future. Then, this report contains a breakdown of the scoring for each construct we surveyed, highlighting areas of strength and areas of concern. Finally, we have provided Focus Forward action items throughout the report and a timeline suggesting how to move forward with what you have learned from the survey results.

Your report represents aggregate data, but some organizations will want further information. For example, the SEE makes it possible to see results broken down by demographic groupings. We would enjoy hearing how you've used the data, and what you liked and disliked about the SEE experience. We are here to help you engage your employees in achieving your vision and mission.

Noel Landuyt
Associate Director
Institute for Organizational Excellence

Organization Profile

Sample Agency

Organizational Leadership:
Pat Generic, Executive Director

Benchmark Categories:
Size 2: Organizations with 26 to 100 employees
Mission 5 : Public Safety/Criminal Justice

Survey Administration

Collection Period:
10/09/2015 through 10/23/2015

Survey Liaison:
Morgan Smith
Liaison
1234 N. Congress Ave.
Ste. 4321
Austin, TX 78701

(512) 555-1212
morgansmith@fakemail.com

EMPLOYEE ENGAGEMENT
INSTITUTE FOR ORGANIZATIONAL EXCELLENCE

1

Benchmark Information

Agencies are categorized by number of employees and by mission. These are used to create benchmark comparison data.

Contact Information

Front page contains the name of the organizational head and contact information for the liaison.

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Executive Summary >> The Survey

Primary Items

The survey is comprised of 48 items to measure employee engagement and specific aspects of the agency. Items are on a 5-point likert-scale in which answers range from 5 (strongly agree) to 1 (strongly disagree).

Demographic Items

The SEE measures demographic items (age, gender, race, salary, education level) to offer breakdown of organization demographics

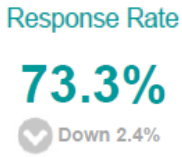
Constructs

Items are broken into 12-constructs to measure areas that drive organizational performance and engagement

Additional Items

Optional customizable items that can target issues specific to the organization.

Executive Summary >> Employee Engagement



Response Rates

This is the overall response rate. It offers the first glimpse of employee engagement. A rate above 50% is good, while a lower than 40% may indicate issues.

Overall Engagement Score

Overall employee engagement. A score above 350 are good, with Scores above 400 are the result of high overall employee engagement. Scores below 300 are a cause for concern.

Employee Engagement Levels

Twelve items across several of the constructs breakdown to measure engagement of individual employees.

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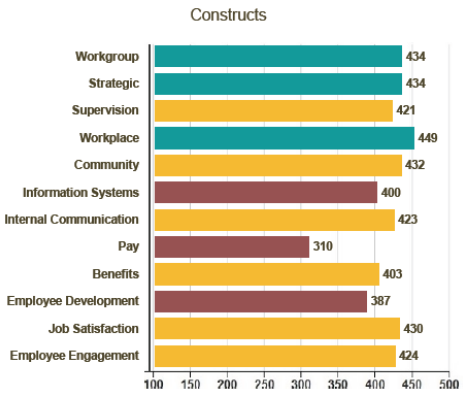
Executive Summary >> People

The People section offers a breakdown of the following:

- Demographics such as age, race, and gender.
- Years of service of those in the organization
- Participants intending to leave the agency
- Participants that are nearing retirement.

Executive Summary >> Constructs



The construct section offers the following:

- Breakdown of overall scores across the twelve constructs.
- The three highest are coded green, the three lowest are red, and the others are yellow.
- The lowest score for a construct is 100, while the highest is 500.
- Scores typically range from 300 to 450, with 350 being the tipping point between positive and negative perception.

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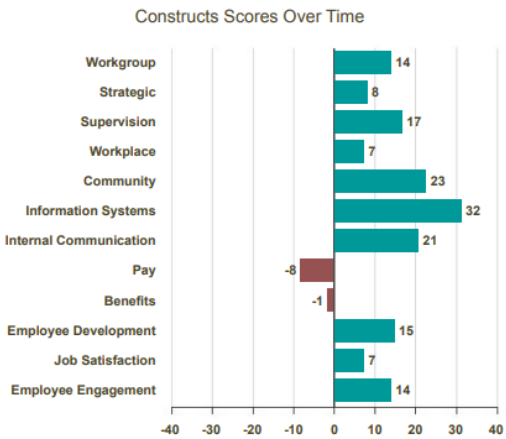
Executive Summary >> Constructs Over Time

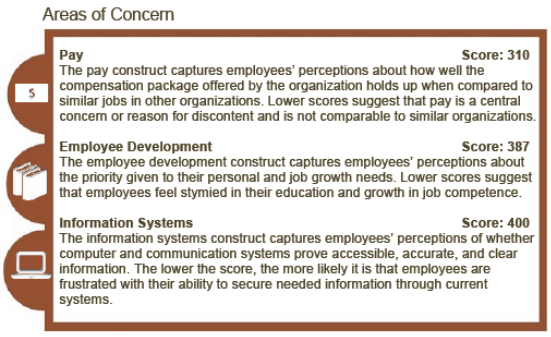


One of the benefits of continuing to participate in the survey is that over time data shows how employees' views have changed as a result of implementing efforts suggested by previous survey results.

- Positive changes indicate that employees perceive the issue as having improved since the previous survey.
- Negative changes indicate that the employees perceive that the issue has worsened since the previous survey.
- Negative changes of greater than 40 points and having 8 or more negative construct changes should be a source of concern for the organization.

Executive Summary >> Areas of Strengths and Concern

Areas of Strength
Offers breakdowns of the three highest construct scores.
It provides insight into what your agency is doing well.



Areas of Concern
Offers breakdowns of constructs that employees reported the least satisfaction with.
Offers insight into the specific organizational aspects that employees want to see improved upon

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Executive Summary >> Climate

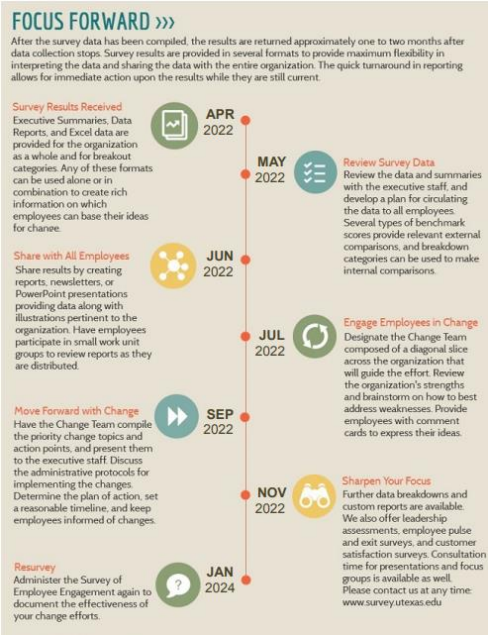
13.6% feel there aren't enough opportunities to give **supervisor feedback**. Leadership skills should be evaluated and sharpened on a regular basis. Consider implementing 360 Degree Leadership Evaluations so supervisors can get feedback from their bosses, peers, and direct reports.	**9.5%** feel that **upper management** could communicate better. Upper management should make efforts to be visible and accessible, as well as utilize intranet/internet sites, email, and social media as appropriate to keep employees informed.	Highest Level of Disagreement
5.5% believe the **information from this survey** will go unused. Conducting the survey creates momentum and interest in organizational improvement, so it's critical that leadership acts upon the data and keeps employees informed of changes as they occur.	**3.1%** feel they are **not treated fairly** in the workplace. Favoritism can negatively affect morale and cause resentment among employees. When possible, ensure responsibilities and opportunities are being shared evenly and appropriately.	
2.5% feel there are **issues with ethics** in the workplace. An ethical climate is a foundation of building trust within an organization. Reinforce the importance of ethical behavior to employees, and ensure there are appropriate channels to handle ethical violations.	**1.7%** feel **workplace harassment** is not adequately addressed. While no amount of harassment is desirable within an organization, percentages **above 5%** require a serious look at workplace culture and the policies for dealing with harassment.	Lowest Level of Disagreement

The climate section measures employee's feelings toward workplace environment.

- Measured through 6 climate items.
- Appropriate climate is a combination of a safe, non-harassing environment in which employees are ethically abiding and treat each other fairly.

Executive Summary >> Next Steps

This section offers suggestions and a timeline to start making changes utilizing the survey feedback. More detailed steps can be found in the Next Steps section of this guide.



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Executive Summary >> Demographic Items

Total Respondents: 1133 Surveys Distributed: 1212 Response Rate: 93.48%	Number of Survey Respondents	Percent of Survey Respondents
My highest education level		
Did not earn high school diploma or equivalent:	Less than 5	Not Available
High school diploma or equivalent:	112	9.89%
Some college:	234	20.65%
Associate's Degree:	89	7.86%
Bachelor's Degree:	375	33.10%
Master's Degree:	146	12.89%
Doctoral Degree:	115	10.15%
Prefer not to answer:	61	5.38%

This section gives a breakdown for the demographic information of those who completed they survey.

Executive Summary >> Items

6. I know how my work impacts others in the organization.

95% Agreement

Response:	Strongly Agree	Agree	Neutral	Disagree	Strongly Disagree	Don't Know/NA
Respondents:	12	9	1	0	0	0
Percentage:	54.55%	40.91%	4.55%	0.00%	0.00%	0.00%

95% Agreement	
SCORE:	4.50
Std. Dev.:	0.60
Total Respondents:	22
BENCHMARKS	
Past Score:	4.39
Similar Mission:	4.09
Similar Size:	4.22
All Orgs:	4.12

7. My organization develops services to match the needs of our customers/clients.

86% Agreement

Response:	Strongly Agree	Agree	Neutral	Disagree	Strongly Disagree	Don't Know/NA
Respondents:	8	11	1	1	0	1
Percentage:	36.36%	50.00%	4.55%	4.55%	0.00%	4.55%

86% Agreement	
SCORE:	4.24
Std. Dev.:	0.77
Total Respondents:	22
BENCHMARKS	
Past Score:	3.96
Similar Mission:	3.79
Similar Size:	3.95
All Orgs:	3.97

Response Data

- Score is calculated on a five point scale ranging from 5 (strongly agree) to 1 (strongly disagree). A participant who selects “Don’t Know/Not Applicable” has their response considered valid, but it is not calculated into the score.
- Standard deviation calculates the level of agreement. Larger deviations indicate greater levels of disagreement.
- Percentage offers a breakdown of the number of participants who selected each item (strongly agree, agree, ect.)
- Percentage agreement is totally number of participants who agree with the item (Strongly Agree or Agree).

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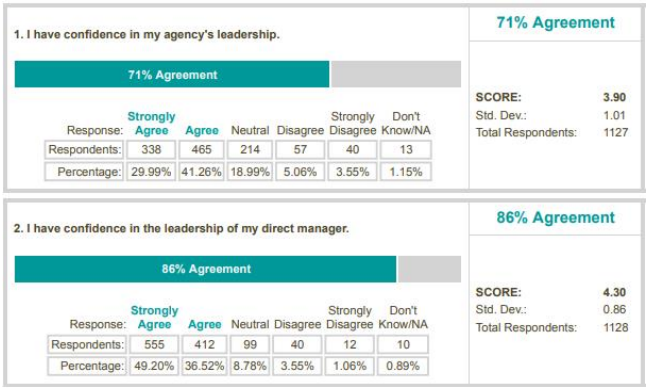
Benchmark Data

- Past Score is a comparison to organizations score from the previous survey
- Similar Mission: Average score of organizations who share a similar mission
- Similar Size; Average score of organizations that are in the same size bracket.

Executive Summary >> Additional Items



1. I have confidence in my agency's leadership.

71% Agreement

Response:	Strongly Agree	Agree	Neutral	Disagree	Strongly Disagree	Don't Know/NA
Respondents:	338	465	214	57	40	13
Percentage:	29.99%	41.26%	18.99%	5.06%	3.55%	1.15%

71% Agreement

SCORE: 3.90
Std. Dev.: 1.01
Total Respondents: 1127

2. I have confidence in the leadership of my direct manager.

86% Agreement

Response:	Strongly Agree	Agree	Neutral	Disagree	Strongly Disagree	Don't Know/NA
Respondents:	555	412	99	40	12	10
Percentage:	49.20%	36.52%	8.78%	3.55%	1.06%	0.89%

86% Agreement

SCORE: 4.30
Std. Dev.: 0.86
Total Respondents: 1128

Additional Items
Organizations participating in the Survey are invited to submit up to 20 additional items for inclusion in the Survey. Additional items are not included in the report if none were submitted
Response Data

- Score is calculated on a five point scale ranging from 5 (strongly agree) to 1 (strongly disagree). A participant who selects "Don't Know/Not Applicable" has their response considered valid, but it is not calculated into the score.
- Standard deviation calculates the level of agreement. Larger deviations indicate greater levels of disagreement.
- Percentage offers a breakdown of the number of participants who selected each item (strongly agree, agree, ect.)
- Percentage agreement is totally number of participants who agree with the item (Strongly Agree or Agree).

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Executive Summary >> Engagement Items

2. In my work group, my opinions and ideas count.

84% Agreement

Response:	Strongly Agree	Agree	Neutral	Disagree	Strongly Disagree	Don't Know/NA
Respondents:	495	447	127	37	14	8
Percentage:	43.88%	39.63%	11.26%	3.28%	1.24%	0.71%

84% Agreement	
SCORE:	4.23
Std. Dev.:	0.87
Total Respondents:	1128
BENCHMARKS	
Past Score:	4.08
Similar Mission:	4.17
Similar Size:	3.98
All Orgs:	4.09

5. Our organization is known for the quality of work we provide.

81% Agreement

Response:	Strongly Agree	Agree	Neutral	Disagree	Strongly Disagree	Don't Know/NA
Respondents:	453	458	153	32	10	19
Percentage:	40.27%	40.71%	13.60%	2.84%	0.89%	1.69%

81% Agreement	
SCORE:	4.19
Std. Dev.:	0.84
Total Respondents:	1125
BENCHMARKS	
Past Score:	4.06
Similar Mission:	4.11
Similar Size:	4.00
All Orgs:	4.10

Engagement Construct

This construct measures the degree to which employees feel that their ideas count, their work impacts the organization and their well being and development is valued.

Response Data

- Score is calculated on a five point scale ranging from 5 (strongly agree) to 1 (strongly disagree). A participant who selects “Don’t Know/Not Applicable” has their response considered valid, but it is not calculated into the score.
- Standard deviation calculates the level of agreement. Larger deviations indicate greater levels of disagreement.
- Percentage offers a breakdown of the number of participants who selected each item (strongly agree, agree, ect.)
- Percentage agreement is totally number of participants who agree with the item (Strongly Agree or Agree).

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Executive Summary >> Constructs and Related Items

Workgroup	Construct Score: 419	
The workgroup construct captures employees' perceptions of the people they work with on a daily basis and how effective they are. This construct measures the degree to which employees view their workgroup as effective, cohesive and open to the opinions of all members.	**Score**	**Std. Dev.**
1. My work group cooperates to get the job done.	4.43	0.74
2. In my work group, my opinions and ideas count.	4.23	0.87
3. My work group regularly uses performance data to improve the quality of our work.	3.91	0.98
4. In my work group, there is a real feeling of teamwork.	4.17	0.94

Constructs
The Survey of Employee Engagement framework is composed of twelve Survey Constructs designed to broadly profile areas of strength and concern so that interventions may be targeted appropriately. Survey Constructs are developed from the Primary Items (numbered 1-48)
Response Data

- Current Score is calculated by averaging the mean score of the related primary items and then multiplying by 100. For example if the construct score is 389, then the average of the related primary items is 3.89.
- In general, most scores are between 300 and 400. Scores below a 325 are of concern because they indicate general dissatisfaction. Scores above 375 indicate positive perceptions.

Executive Summary >> Survey Customization Sheet

Organizational Category Codes: Category 1

101 - Commissioner's Administration; Agency Affairs	102 - Internal Audit
105 - General Counsel	104 - Public Affairs
107 - Customer Operations	106 - Administrative Operations
109 - Enforcement	108 - Financial Regulation
111 - Life & Health	110 - Property & Casualty
113 - Division of Worker's Compensation	112 - State Fire Marshal

Additional Items

1. I have confidence in my agency's leadership.
2. I have confidence in the leadership of my direct manager.
3. My manager does a good job of resolving employee complaints once they are brought to his or her attention.
4. My manager meets with me regularly.
5. I am aware that I do not have to go through my chain of command to discuss issues with the employee ombudsman & ethics advisor.

Organizational Categories and Additional Items
Organizations have the option to categories their employees and include up to 20 additional items. This sheet lists these items. Categories and Additional items are not included in the report if none were submitted.

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Organizational Category (OC) Breakout Reports

Click here to download a Sample Organizational Category Breakout Report.

OC Breakout Report vs Overall Executive Summary

Executive Summary

- Contains aggregate data from all survey participants
- Constructs are compared to previous iterations of the survey, as well as to benchmarks of organization of similar sizes and missions

OC Breakout Report

- Contains aggregate data from participants precoded/coded into a specific category
- Constructs are compared to the overall organization's scores
- All organizations can divide their employees into categories when setting up their survey. If categories were not provided, then this report is not applicable

Sample Organization

Sample Category

Executive Summary

YEAR

Constructs

- Breakdown of overall scores across the twelve constructs.
- Three highest are coded green, the three lowest are red, and the others are yellow.
- The lowest score for a construct is 100, while the highest is 500.
- Scores typically range from 300 to 450, with 350 being the tipping point between positive and negative perception.

INSTITUTE FOR ORGANIZATIONAL EXCELLENCE
THE UNIVERSITY OF TEXAS AT AUSTIN

Click here to watch an instructional video on understanding your report

Or follow this link:
https://youtu.be/LyN3Wh5LbgA

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OC Breakout Report >> Table of Contents

The OC Breakout Report includes the following:

Executive Summary
Table of Contents

- Introduction: Overview of report, organizational profile
- The Survey: Overview of survey tool and survey constructs
- Employee Engagement: Breakdown of overall engagement rating, response rate, and levels of engagement
- People: Demographic breakdown of agency
- Constructs: Breakdown of constructs and scoring
- Construct Comparison**:** Construct scores compared to the overall organization score.
- Areas of Strengths and Concerns: Breakdown of best scores and lows
- Climate: Overview of items measuring organizational climate
- Focus Forward: Suggested timeline after the results
- Demographic items: Detailed breakdown of the demographics of survey participants
- Primary items: Overview of scores for items
- Additional Items: Scoring of your additional items
- Engagement Items: Scoring of items related to measuring Engagement
- Constructs and Related Items: Scoring of constructs and the items related to each construct
- Survey Customization Sheet: A list of organizational categories and additional items used

OC Breakout Report >> Introduction

Introduction

THANK YOU for your participation in the Survey of Employee Engagement (SEE). We trust that you will find this information helpful in your leadership planning and organizational development efforts. The SEE is specifically focused on the key drivers relative to the ability to engage employees towards successfully fulfilling the vision and mission of the organization.

Inside this report, you will find many tools to assist you in understanding the engagement of your employees. Your first indication of engagement will be the response rate of your employees. From there, we share with you the overall score for your organization, averaging all survey items. You will also find a breakdown of the levels of engagement found among your employees. We have provided demographic information about the employees surveyed as well as what percent are leaving or retiring in the near future. Then, this report contains a breakdown of the scoring for each construct we surveyed, highlighting areas of strength and areas of concern. Finally, we have provided Focus Forward action items throughout the report and a timeline suggesting how to move forward with what you have learned from the survey results.

Your report represents aggregate data, but some organizations will want further information. For example, the SEE makes it possible to see results broken down by demographic groupings. We would enjoy hearing how you've used the data, and what you liked and disliked about the SEE experience. We are here to help you engage your employees in achieving your vision and mission.

Noel Landuyt
Associate Director
Institute for Organizational Excellence

Organization Profile

Sample Organization
210 - Sample Category

Organizational Leadership:
(Name OF), Commissoner

Benchmark Categories:
Size 5: Organizations with 1001 to 10,000
Mission 8: Regulatory employees

Survey Administration

Collection Period:
DATE through DATE

Survey Liaison:
Morgan Smith
Project Manager HR
1234 Apple St,
P.O Box 12345
Austin, TX 71111

(123)-456-7891
morgansmith@fakemail.com

Category

The name and code of the category that is the subject of the report.

Contact Information

Front page contains the name of the organizational head and contact information for the liaison.

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OC Breakout Report >> The Survey

Primary Items

The survey is comprised of 48 items to measure employee engagement and specific aspects of the agency. Items are on a 5-point likert-scale in which answers range from 5 (strongly agree) to 1 (strongly disagree).

Demographic Items

The SEE measures demographic items (age, gender, race, salary, education level) to offer breakdown of organization demographics

Constructs

Items are broken into 12-constructs to measure areas that drive organizational performance and engagement

Additional Items

Optional customizable items that can target issues specific to the organization

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OC Breakout Report >> Employee Engagement

Response Rates

Categories that make up a high percentage of the total organization can notice significance in even small deviations (1 to 4 points) from the scores of the whole organization. For smaller categories, larger deviations (five or more points) may be needed to note a significantly higher or lower score

Overall Engagement Score

Overall employee engagement. A score above 350 are good, with Scores above 400 are the result of high overall employee engagement. Scores below 300 are a cause for concern.

Employee Engagement Levels

Twelve items across several of the constructs breakdown to measure engagement of individual employees.

OC Breakout Report >> People

The People section offers a breakdown of the following:

- Demographics such as age, race, and gender.
- Years of service of those in the organization
- Participants intending to leave the agency
- Participants that are nearing retirement.

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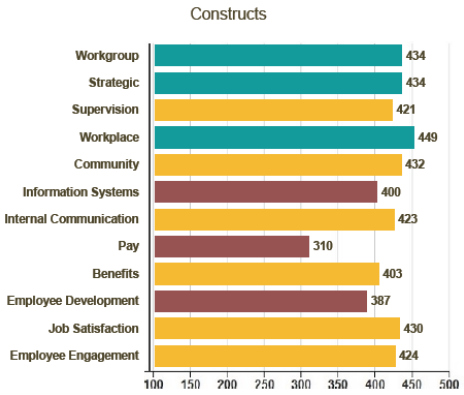
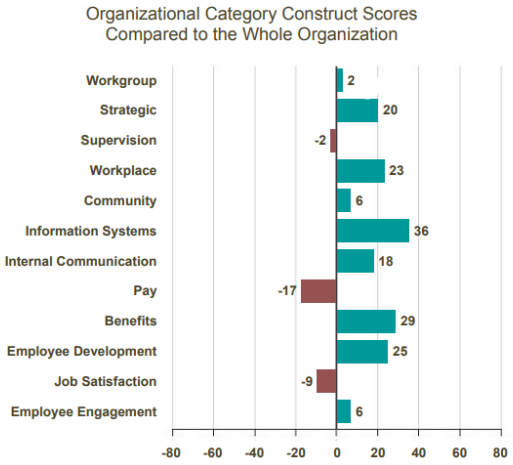
OC Breakout Report >> Constructs



The construct section offers the following:

- Breakdown of overall scores across the twelve constructs.
- The three highest are coded green, the three lowest are red, and the others are yellow.
- The lowest score for a construct is 100, while the highest is 500.
- Scores typically range from 300 to 450, with 350 being the tipping point between positive and negative perception.

OC Breakout Report >> Constructs Comparison



- Data from this categorization make it possible to understand the viewpoints of employees from different parts of the organization and to determine the extent to which perceptions may or may not be consistent throughout the organization.
- Positive changes indicate that employees perceive the issue as having improved since the previous survey.
- Negative changes indicate that the employees perceive that the issue has worsened since the previous survey.
- Organizational Categories that make up a high percentage of the respondents of the total organization can notice significance in even small deviations (1 to 4 points) from the scores of the whole organization.
- For Organizational Categories that hold a smaller portion of the percentage, larger deviations (five or more points) may be needed to note a significantly higher or lower score.

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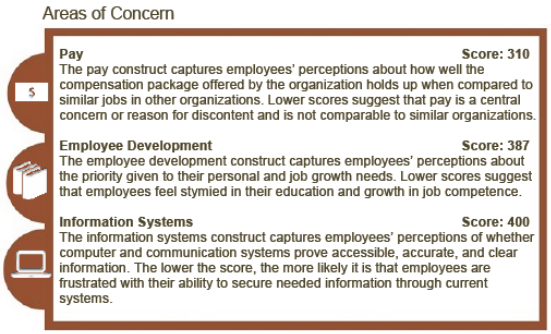
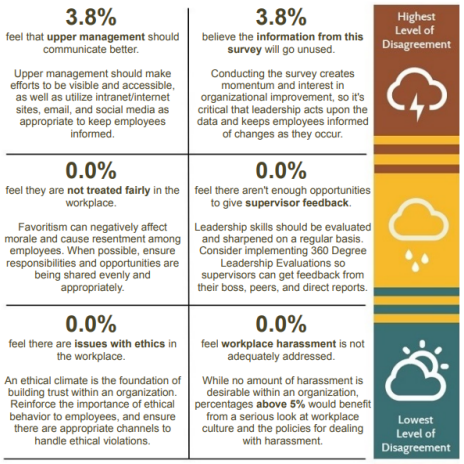
OC Breakout Report >> Areas of Strengths and Concern

Areas of Strength
Offers breakdowns of the three highest construct scores.
It provides insight into what your agency is doing well.



Areas of Concern
Offers breakdowns of constructs that employees reported the least satisfaction with.
Offers insight into the specific organizational aspects that employees want to see improved upon

OC Breakout Report >> Climate



The climate section measures employee's feelings toward workplace environment.

- Measured through 6 climate items.
- Appropriate climate is a combination of a safe, non-harassing environment in which employees are ethically abiding and treat each other fairly.

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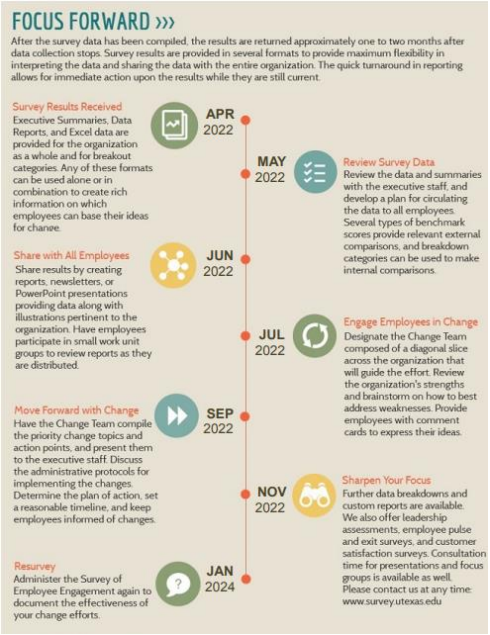
OC Breakout Report >> Next Steps

This section offers suggestions and a timeline to start making changes utilizing the survey feedback. More detailed steps can be found in the Next Steps section of this guide.



OC Breakout Report >> Demographic Items

Total Respondents: 26	Number of Survey Respondents	Percent of Survey Respondents	Organization as a Whole
My highest education level			
Did not earn high school diploma or equivalent:	Less than 5	Not Available	Not Available
High school diploma or equivalent:	Less than 5	Not Available	9.89%
Some college:	7	26.92%	20.65%
Associate's Degree:	Less than 5	Not Available	7.86%
Bachelor's Degree:	10	38.46%	33.10%
Master's Degree:	Less than 5	Not Available	12.89%
Doctoral Degree:	Less than 5	Not Available	10.15%
Prefer not to answer:	Less than 5	Not Available	5.38%

This section gives a breakdown for the demographic information of those who completed they survey. If an item has less than 5 respondents, no data will be provided. This is to protect the confidentiality of the participants.

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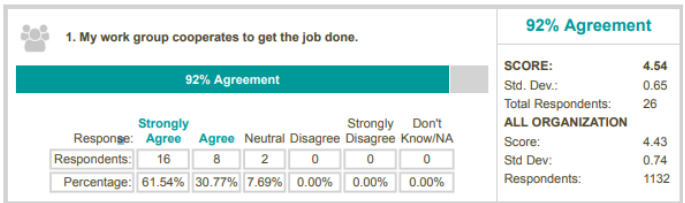
OC Breakout Report >> Items



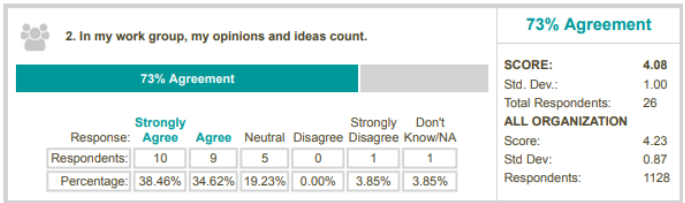
1. My work group cooperates to get the job done.

92% Agreement

Response:	Strongly Agree	Agree	Neutral	Disagree	Strongly Disagree	Don't Know/NA
Respondents:	16	8	2	0	0	0
Percentage:	61.54%	30.77%	7.69%	0.00%	0.00%	0.00%

92% Agreement

SCORE:	4.54
Std. Dev.:	0.65
Total Respondents:	26
ALL ORGANIZATION	
Score:	4.43
Std Dev:	0.74
Respondents:	1132



2. In my work group, my opinions and ideas count.

73% Agreement

Response:	Strongly Agree	Agree	Neutral	Disagree	Strongly Disagree	Don't Know/NA
Respondents:	10	9	5	0	1	1
Percentage:	38.46%	34.62%	19.23%	0.00%	3.85%	3.85%

73% Agreement

SCORE:	4.08
Std. Dev.:	1.00
Total Respondents:	26
ALL ORGANIZATION	
Score:	4.23
Std Dev:	0.87
Respondents:	1128

Response Data

- Score is calculated on a five point scale ranging from 5 (strongly agree) to 1 (strongly disagree). A participant who selects “Don’t Know/Not Applicable” has their response considered valid, but it is not calculated into the score.
- Standard deviation calculates the level of agreement. Larger deviations indicate greater levels of disagreement.
- Percentage offers a breakdown of the number of participants who selected each item (strongly agree, agree, ect.)
- Percentage agreement is totally number of participants who agree with the item (Strongly Agree or Agree).

All Organization Data

- This is a comparison to the overall organization’s score

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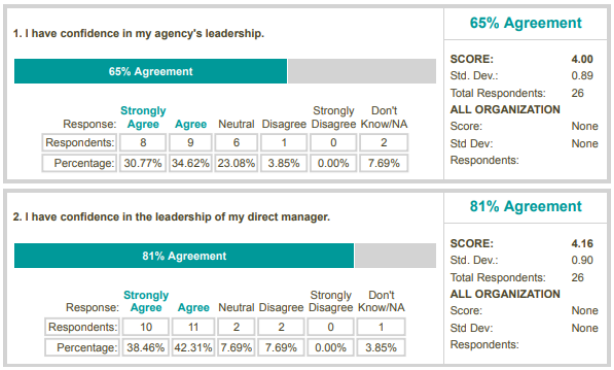
OC Breakout Report >> Additional Items



1. I have confidence in my agency's leadership.

65% Agreement

Response:	Strongly Agree	Agree	Neutral	Disagree	Strongly Disagree	Don't Know/NA
Respondents:	8	9	6	1	0	2
Percentage:	30.77%	34.62%	23.08%	3.85%	0.00%	7.69%

65% Agreement

SCORE:	4.00
Std. Dev.:	0.89
Total Respondents:	26
ALL ORGANIZATION	
Score:	None
Std Dev:	None
Respondents:	

2. I have confidence in the leadership of my direct manager.

81% Agreement

Response:	Strongly Agree	Agree	Neutral	Disagree	Strongly Disagree	Don't Know/NA
Respondents:	10	11	2	2	0	1
Percentage:	38.46%	42.31%	7.69%	7.69%	0.00%	3.85%

81% Agreement

SCORE:	4.16
Std. Dev.:	0.90
Total Respondents:	26
ALL ORGANIZATION	
Score:	None
Std Dev:	None
Respondents:	

Additional Items

Organizations participating in the Survey are invited to submit up to 20 additional items for inclusion in the Survey. Additional items are not included in the report if none were submitted

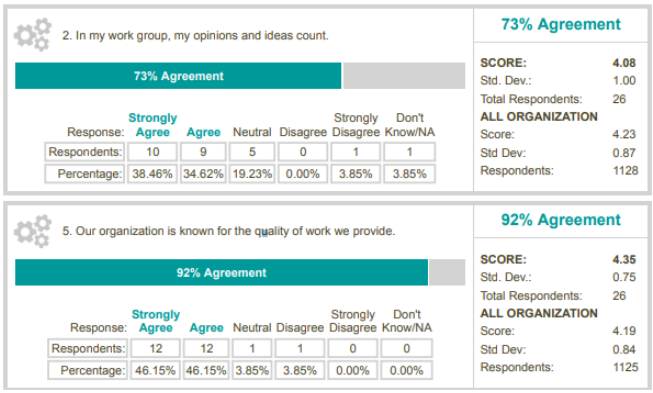
Response Data

- Score is calculated on a five point scale ranging from 5 (strongly agree) to 1 (strongly disagree). A participant who selects "Don't Know/Not Applicable" has their response considered valid, but it is not calculated into the score.
- Standard deviation calculates the level of agreement. Larger deviations indicate greater levels of disagreement.
- Percentage offers a breakdown of the number of participants who selected each item (strongly agree, agree, ect.)
- Percentage agreement is totally number of participants who agree with the item (Strongly Agree or Agree).

All Organization Data

- This is a comparison to the overall organization's score

OC Breakout Report >> Engagement Items



2. In my work group, my opinions and ideas count.

73% Agreement

Response:	Strongly Agree	Agree	Neutral	Disagree	Strongly Disagree	Don't Know/NA
Respondents:	10	9	5	0	1	1
Percentage:	38.46%	34.62%	19.23%	0.00%	3.85%	3.85%

73% Agreement

SCORE:	4.08
Std. Dev.:	1.00
Total Respondents:	26
ALL ORGANIZATION	
Score:	4.23
Std Dev:	0.87
Respondents:	1128

5. Our organization is known for the quality of work we provide.

92% Agreement

Response:	Strongly Agree	Agree	Neutral	Disagree	Strongly Disagree	Don't Know/NA
Respondents:	12	12	1	1	0	0
Percentage:	46.15%	46.15%	3.85%	3.85%	0.00%	0.00%

92% Agreement

SCORE:	4.35
Std. Dev.:	0.75
Total Respondents:	26
ALL ORGANIZATION	
Score:	4.19
Std Dev:	0.84
Respondents:	1125

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Engagement Construct
This construct measures the degree to which employees feel that their ideas count, their work impacts the organization and their well being and development is valued.
Response Data

- Score is calculated on a five point scale ranging from 5 (strongly agree) to 1 (strongly disagree). A participant who selects "Don't Know/Not Applicable" has their response considered valid, but it is not calculated into the score.
- Standard deviation calculates the level of agreement. Larger deviations indicate greater levels of disagreement.
- Percentage offers a breakdown of the number of participants who selected each item (strongly agree, agree, ect.)
- Percentage agreement is totally number of participants who agree with the item (Strongly Agree or Agree).

All Organization Data

- This is a comparison to the overall organization's score

OC Breakout Report >> Constructs and Related Items

Workgroup — Construct Score: 419

The workgroup construct captures employees' perceptions of the people they work with on a daily basis and how effective they are. This construct measures the degree to which employees view their workgroup as effective, cohesive and open to the opinions of all members.	Score	Std. Dev.
1. My work group cooperates to get the job done.	4.43	0.74
2. In my work group, my opinions and ideas count.	4.23	0.87
3. My work group regularly uses performance data to improve the quality of our work.	3.91	0.98
4. In my work group, there is a real feeling of teamwork.	4.17	0.94

Constructs
The Survey of Employee Engagement framework is composed of twelve Survey Constructs designed to broadly profile areas of strength and concern so that interventions may be targeted appropriately. Survey Constructs are developed from the Primary Items (numbered 1-48)
Response Data

- Current Score is calculated by averaging the mean score of the related primary items and then multiplying by 100. For example if the construct score is 389, then the average of the related primary items is 3.89.
- In general, most scores are between 300 and 400. Scores below a 325 are of concern because they indicate general dissatisfaction. Scores above 375 indicate positive perceptions.

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OC Breakout Report >> Survey Customization Sheet

Organizational Category Codes: Category 1

101 - Commissioner's Administration; Agency Affairs	102 - Internal Audit
105 - General Counsel	104 - Public Affairs
107 - Customer Operations	106 - Administrative Operations
109 - Enforcement	108 - Financial Regulation
111 - Life & Health	110 - Property & Casualty
113 - Division of Worker's Compensation	112 - State Fire Marshal

Additional Items

1. I have confidence in my agency's leadership.
2. I have confidence in the leadership of my direct manager.
3. My manager does a good job of resolving employee complaints once they are brought to his or her attention.
4. My manager meets with me regularly.
5. I am aware that I do not have to go through my chain of command to discuss issues with the employee ombudsman & ethics advisor.

Organizational Categories and Additional Items

Organizations have the option to categories their employees and include up to 20 additional items. This sheet lists these items. Categories and Additional items are not included in the report if none were submitted.

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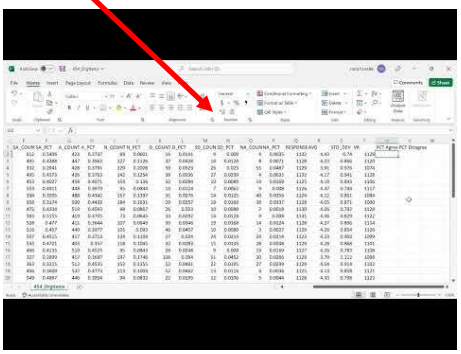
Excel Files

The excel files provided allow you to utilize the data from the Survey of Employee Engagement for your own organization's needs. While the reports provided offer valuable information, the excel files contains all the scores for each primary item, additional item, and construct for the overall organization and breakout organizational categories (if utilized). The following excel files are included:

- ItemsTwisted
- AdditionalItems
- Constructs
- ConstructsTwisted
- Items/OrgItems
- OrgItemsOverTime

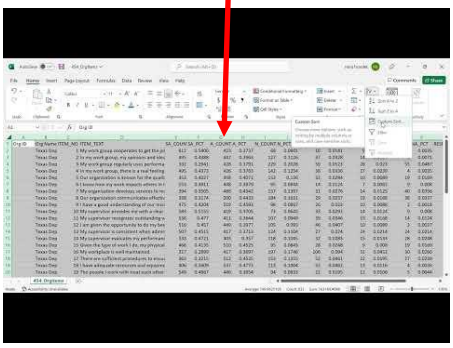
Below are 3 Youtube tutorial videos that walk you through 3 different ways to utilize Excel to visualize your data

Click on this video to Find percent agree and disagree



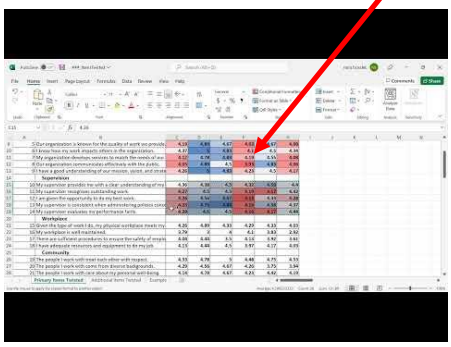
https://youtu.be/wDAZMbOIcsQ

Click on this video to Find the highest and lowest scoring items



https://youtu.be/ELjMLEngASs

Click on this video to Use Conditional Formatting to see patterns in your data



https://youtu.be/IQYFuQNLMj0

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ItemsTwisted

ItemsTwisted displays the 48 primary items under their related construct. It also shows the overall agency score for each primary item and the score broken out by category. This is the only All Agency excel file. The rest are divided by category. If you did not utilize categories, this is the only excel file you'll receive.

Scores are calculated by averaging all item responses on a five point scale ranging from 5=Strongly Agree to 1=Strongly Disagree. If the participant selected Don't Know/Not Applicable, their response is considered a valid response, but it is not used in the calculation of the score.

If your organization utilized Additional Items, they can be found in a separate tab.

Overall agency score

Organizational category 101 score

Construct

Primary items

A	B	C	D	E	F	G	H	I	J
		Overall	101 - Com	102 - Inter	103 - Insu	104 - Publ	105 - Gene	106 - Adm	107 - Cust
	Workgroup								
1	My work group cooperates to get the job	4.43	4.89	4.67	4.32	4.75	4.56	4.52	4.45
2	In my work group, my opinions and ideas	4.23	4.89	4.83	4.1	4.33	4.42	4.3	4.17
3	My work group regularly uses performanc	3.91	4.63	4.5	4.03	4.25	3.53	3.76	4.06
4	In my work group, there is a real feeling o	4.17	4.78	4.83	4.06	4.67	4.25	4.25	4.25
	Strategic								
5	Our organization is known for the quality	4.19	4.89	4.67	4.03	4.67	4.09	4.26	4.34
6	I know how my work impacts others in the	4.37	5	4.83	4.1	4.5	4.34	4.47	4.4
7	My organization develops services to mat	4.12	4.78	4.83	4.19	4.55	4.08	4.24	4.28
8	Our organization communicates effectivel	4.05	4.89	4.5	3.93	4.83	4.06	3.96	4.27
9	I have a good understanding of our missic	4.26	5	4.83	4.23	4.5	4.17	4.15	4.47

Excel Tip: Use conditional formatting to create a color visualization of low and high scores. Watch the video to see how to use conditional formatting in your ItemsTwisted sheet.

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AdditionalItems

The AdditionalItems file gives you the percentage breakdown of how each person responded within a category to the additional items. A file is provided for the overall organization named "###_OrgAdditionalItems" and each organizational category code. The name of the file will include the organization's code, and the category number, for example "###_OC1_AdditionalItems."

Contents of each column:

- Column A - the category number.
- Column B - the category name.
- Column C - the additional item number
- Column D - the additional item's text
- Column E - the number of respondents who selected Strongly Agree
- Column F - the percentage of respondents who selected Strongly Agree
- Column G - the number of respondents who selected Agree
- Column H - the percentage of respondents who selected Agree
- Column I - the number of respondents who selected Neutral
- Column J - the percentage of respondents who selected Neutral
- Column K - the number of respondents who selected Disagree
- Column L - the percentage of respondents who selected Disagree
- Column M - the number of respondents who selected Strongly Disagree
- Column N - the percentage of respondents who selected Strongly Disagree
- Column O - the number of respondents who selected Not Applicable
- Column P - the percentage of respondents who selected Not Applicable
- Column Q - the total number of respondents to that item
- Column R - the average score of that item
- Column S - the standard deviation of the scores of that item
- Column T – the number of valid responses

A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S	T
ID	NAME	ITEM_NO	ITEM_TE	SA_COUN	SA_PCT	A_COUNT	A_PCT	N_COUN	N_PCT	D_COUNT	D_PCT	SD_COUN	SD_PCT	NA_COUI	NA_PCT	RESPONS	AVG	STD_DEV	VR
101	Commissioner's /	1	I have co	7	0.7778	0	0	2	0.2222	0	0	0	0	0	0	9	4.56	0.882	9
101	Commissioner's /	2	I have co	6	0.6667	0	0	2	0.2222	0	0	0	0	1	0.1111	9	4.5	0.926	8
101	Commissioner's /	3	My mana	6	0.6667	0	0	1	0.1111	0	0	0	0	2	0.2222	9	4.71	0.756	7
101	Commissioner's /	4	My mana	5	0.5556	2	0.2222	1	0.1111	0	0	0	0	1	0.1111	9	4.5	0.756	8

Excel Tip: Use excel to find out the total percent of people who agree or disagree with an item.

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Constructs

The Constructs file is created for the overall organization and each Organizational Category. It contains the scores for each construct per category code. Construct scores are calculated by averaging the mean score of the related primary items and then multiplying by 100. For example if the average of the related primary items is 3.89, then the construct score is 389. The name of the file of the breakout categories will include the organization's code, and the category number, for example "###_OC1_Constructs."

Contents of each column:

- Column A - the category number.
- Column B - the category name.
- Column C - the construct number
- Column D - the construct name
- Column E - the construct score

	A	B	C	D	E
1	ID	NAME	CONS_NO	CONS_NAME	SCORE
2	101	Commissi	1	Workgroup	480
3	101	Commissi	2	Strategic	491
4	101	Commissi	3	Supervision	456
5	101	Commissi	4	Workplace	419
6	101	Commissi	5	Community	470
7	101	Commissi	6	Information Sy	442
8	101	Commissi	7	Internal Comm	452
9	101	Commissi	8	Pay	326
10	101	Commissi	9	Benefits	426
11	101	Commissi	10	Employee Dev	463
12	101	Commissi	11	Job Satisfactio	464
13	101	Commissi	12	Employee Enga	465
14	101	Commissi	13	Climate	467
15	101	Commissi	15	Diversity, Equit	471

Excel Tip: Use the sorting feature to determine the highest and lowest construct scores within a category or within a construct.

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ConstructsTwisted

The ConstructsTwisted file is created for the overall organization and each Organizational Category. It contains the scores for each construct per category code. Construct scores are calculated by averaging the mean score of the related primary items and then multiplying by 100. For example if the average of the related primary items is 3.89, then the construct score is 389. The name of the file of the breakout categories will include the organization's code, and the category number, for example "###_OC1_ConstructsTwisted."

This file is different from the Constructs file because the items are "twisted" to give you a different way of reading the data. The constructs are listed across the top, making it simple to compare construct scores amongst the different categories.

Contents of each column:

- Column A - the category number.
- Column B - the category name.
- Column C – P - the construct name and scores

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P
1	Org CatID	Org Cat Na	Workgrou	Strategic	Supervisic	Workplac	Communi	Informati	Internal C	Pay	Benefits	Employee	Job Satisf	Employee	Climate	Diversity,
2	101	Commissi	480	491	456	419	470	442	452	326	426	463	464	465	467	471
3	102	Internal A	471	473	460	408	471	446	472	253	400	450	438	464	446	464
4	103	Insurance	413	410	419	412	428	419	400	342	392	402	419	411	407	420
5	104	Public Aff	450	461	437	406	434	402	429	247	445	419	415	436	413	431
6	105	General C	419	415	438	365	417	392	391	276	418	386	413	417	405	422
7	106	Administr	421	422	430	408	421	424	406	253	386	388	405	420	405	417

Excel tip: Use conditional formatting to find out the highest and lowest scoring items.

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OrgItems/Items

The OrgItems and Items files give you the percentage breakdown of how each person responded to the 48 primary items within the whole organization and within each organizational category. A file is provided for each organizational category code. The name of the file of the breakout categories will include the organization's code, and the category number, for example "###_OC1_Items."

Contents of each column:

- Column A - the category number.
- Column B - the category name.
- Column C - the primary item's number
- Column D - the primary item's text
- Column E - the number of respondents who selected Strongly Agree
- Column F - the percentage of respondents who selected Strongly Agree
- Column G - the number of respondents who selected Agree
- Column H - the percentage of respondents who selected Agree
- Column I - the number of respondents who selected Neutral
- Column J - the percentage of respondents who selected Neutral
- Column K - the number of respondents who selected Disagree
- Column L - the percentage of respondents who selected Disagree
- Column M - the number of respondents who selected Strongly Disagree
- Column N - the percentage of respondents who selected Strongly Disagree
- Column O - the number of respondents who selected Not Applicable
- Column P - the percentage of respondents who selected Not Applicable
- Column Q - the total number of respondents to that item
- Column R - the average score of that item
- Column S - the standard deviation of the scores of that item
- Column T – the number of valid responses

	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S	T
1	NAME	ITEM_NO	ITEM_TEX	SA_COUN	SA_PCT	A_COUNT	A_PCT	N_COUNT	N_PCT	D_COUNT	D_PCT	SD_COUN	SD_PCT	NA_COUN	NA_PCT	RESPONSI	AVG	STD_DEV	VR
2	Commissi	1	My work	8	0.8889	1	0.1111	0	0	0	0	0	0	0	0	9	4.89	0.333	9
3	Commissi	2	In my wo	8	0.8889	1	0.1111	0	0	0	0	0	0	0	0	9	4.89	0.333	9
4	Commissi	3	My work	5	0.5556	3	0.3333	0	0	0	0	0	0	1	0.1111	9	4.63	0.518	8
5	Commissi	4	In my wo	7	0.7778	2	0.2222	0	0	0	0	0	0	0	0	9	4.78	0.441	9
6	Commissi	5	Our orga	8	0.8889	1	0.1111	0	0	0	0	0	0	0	0	9	4.89	0.333	9
7	Commissi	6	I know h	9	1	0	0	0	0	0	0	0	0	0	0	9	5	0	9
8	Commissi	7	My organ	7	0.7778	2	0.2222	0	0	0	0	0	0	0	0	9	4.78	0.441	9
9	Commissi	8	Our orga	8	0.8889	1	0.1111	0	0	0	0	0	0	0	0	9	4.89	0.333	9
10	Commissi	9	I have a g	9	1	0	0	0	0	0	0	0	0	0	0	9	5	0	9

Excel tip: Use excel to find out the highest and lowest scoring items.

Excel Tip: Use excel to find out the total percent of people who agree or disagree with an item.

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OrgItemsOverTime

OrgItemsOverTime is provided if your organization has done a Survey of Employee Engagement in the past. It contains the average responses to each of the 48 primary items for every year that the survey has been completed. In the example below, this organization has completed the survey every 2 years since 2002. They data is shown for each year. This allows you to see trends in your organization's scores.

	A	B	C	D	E	F	G	H	I	J	K	L	M	N
1	ID	NAME	ITEM_NO	ITEM_TEX	AVG_2022	AVG_2020	AVG_2018	AVG_2016	AVG_2012	AVG_2010	AVG_2008	AVG_2006	AVG_2004	AVG_2002
2	###	Texas Dep	1	My work	4.43	4.31	4.24	4.19	4.08	4.16	0	0	0	0
3	###	Texas Dep	2	In my wo	4.23	4.08	4.03	4	3.58	3.74	3.61085	3.4375	3.61525	3.70702
4	###	Texas Dep	3	My work	3.91	3.82	3.76	3.69	3.58	3.76	0	0	0	0
5	###	Texas Dep	4	In my wo	4.17	3.97	3.9	3.85	3.65	3.83	3.46353	3.22114	3.36717	3.48697
6	###	Texas Dep	5	Our orgar	4.19	4.06	4	3.99	3.85	3.95	3.99517	3.84781	3.99489	4.04463
7	###	Texas Dep	6	I know ho	4.37	4.3	4.3	4.24	4	4.14	3.78942	3.69101	3.71454	3.7344
8	###	Texas Dep	7	My organ	4.12	4.03	3.97	3.92	3.82	3.98	3.91845	3.77302	3.90657	3.94993
9	###	Texas Dep	8	Our orgar	4.05	3.99	3.96	3.88	3.81	3.93	3.89311	3.78433	3.88215	3.94084
10	###	Texas Dep	9	I have a g	4.26	4.23	4.16	4.12	3.97	4.12	3.86804	3.70799	3.81164	3.78843

Excel Tip: You can use this data to graph the changes in scores over time.

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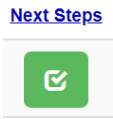
Next Steps

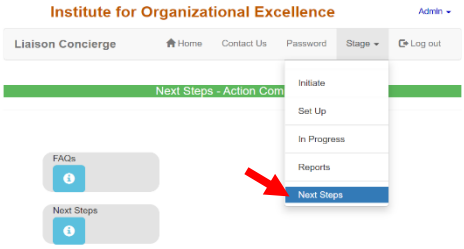
Now that you've received your survey reports, it's time to do something with the data.

There are two ways that you can get to the "Next Steps" section from the home screen of the Liaison Concierge:

1. scroll to the bottom to the "Next Steps" button. Click on the word "Next Steps" or on the colored box directly below it. Then click on the colored box for the desired option.



2. Or navigate from the bar at the top of the home screen. Select "Stages," then select "Next Steps." Then click on the colored box for the desired option.



Recommended next steps include:

1. Engage Employees – strategize how to include all employees in the next steps.

2. Review the Data – analyze the data gathered from the survey. Identify areas of strengths, concerns, and where more information is needed.

3. Share the Data – distribute the results to all employees.

4. Plan – Determine how to address the concerns identified in the data. Decide how to gather any needed additional information. Create a plan with tangible next steps.

5. Action – Carry out plans made. Continue to evaluate if action items are addressing the needs presented in the survey data.

Next Steps Case Study: Click here to read how the Texas Parks and Wildlife Division turned their data into action!

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Next Steps >> Engage Employees

The first step is to identify how to engage your employees in this Next Steps process. There are several benefits of engaging employees, including:

- Building trusting relationships
- Valuing employees
- Encouraging thinking outside the box
- Sharing ownership

To learn more about the value of engaging employees, read this article on importance of Employee Engagement.

Form an "Employee Engagement Committee" (EEC) to facilitate and lead the employee engagement effort. Establishing an employee engagement committee is a standard method to ensure an employee engagement action plan is developed and includes input from both employees and supervisors. This committee can review, analyze, and prioritize employee engagement data to address.

- A mix of about 6 employees
- Supervisors and employees who are both trusted and respected
- Charged with developing a rollback of the data plan and next steps
- ECC given support of leadership
- Assist in determining next steps

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Next Steps >> Review the Data

The organization should prioritize areas of focus and create workgroups and/or questions aiming to evaluate the data. It is best to first share data with your leadership team to give them time to process the information. Once leadership has reviewed, data should be reviewed with staff. It is best to include both employees and managers in this process.

If you have questions or want guidance with your next steps, set up a time to meet with the Survey Office to review your results.

Review the Response Rate

- Questions to ask…
- Are we happy with the response rate?
- Why did people respond?
- Why did people not respond?
- What does the level of response tell us about our organization?

Review the Data

- What constructs or items are low or high scoring?
    - Why are these scores that way?
- What percentage of people Agree or Disagree?
    - Do we have a minimum disagreement level?
- What are some areas we feel we can work at this level?
- What are some areas that need to be addressed at different levels?

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Next Steps >> Share the Data

It is best to first share results with your leadership team to give them time to process the information. Once leadership has reviewed, results should be shared with all staff. In these reviews, communication should focus on highlighting your organizational strengths and as well as weak or low areas.

Summarize Presentations

- Thank employees for participating
- Give and overview of the survey
- Review overall score and engagement score
- Share high and low constructs
- Explain the climate data
- Highlight strengths and concerns

Share Materials

- Place reports on shared drive
- Make reports available in break room
- Post announcement of data presentation
- Post next steps plan and progress made

Share the data using multiple platforms

- Summarize Presentations
- Newsletters
- Email communications
- Publish materials on shared file sites
- Round tables
- Brown bags
- Group meetings
- Supervisor's meetings
- Focus groups

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Next Steps >> Plan

Stress moving from Numbers to Action.

The employee engagement committee can develop a proposed action plan. This plan should be submitted to the leadership team for review and approval. This plan may improve a next step that seeks to gather further information in order to make the best plan, such as an employee focus group.

Generate Action Plans

- Leadership Response
  - Some items may require a response from leadership
- Educational/Training Issue
  - Used when a response to an item would be best handled in this fashion
- Focus Groups
  - Good for gathering a variety of individuals and pulling in diverse opinions
  - A trained facilitator from a different group may needed
- Require Individual Accountability
- Employee Involvement

Creating the Plan

1. The item/area to be addressed?
2. Why is this important?
3. How is this area currently addressed?
4. How are we falling short? (keep asking why to get to root cause)
5. How can we overcome those root causes?
6. **Click here to read an Action Plan Guide**
7. **Click here to find an Action Plan Table**

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Next Steps >> Action

Take Action and Communicate the Plan. Once the plan is finalized the leadership team should implement the plan and adjust plan as organizational strategies and goals change.

- Inform all employees as to how plans and actions were developed and what, where, when and why are they occurring
- Continue to chart progress towards fulfilling plans
- Communicate to employees their role in the plan

Who	When	What
Accountability	Priority	Detailed action step

- Use newsletters and emails to communicate

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Next Steps >> IOE Resources

The Institute for Organizational Excellence offers additional services that can assist in your organization's next steps. The IOE can facilitate focus groups and provide a 360-leadership assessment to build supervisory capacity.

Focus Groups

It is recommended that the employee engagement committee conduct focus groups to better understand the context of the data. Employee focus groups are an effective way to open up discussions on the SEE results that will help in planning future employee engagement strategies. While conducting your own focus groups is a free option (check out this guide if you chose to go this route Focus Group Resource Guide), partnering with a 3rd party to facilitate focus group establishes a neutral space where employees feel more comfortable being honest in their feedback.

You can contract with the Survey Office to facilitate focus groups and receive a focus group report.

Leadership Development

Satisfaction with leadership and management is one of the keys to an engaged employee. The IOE provides a 360-Degree Leadership assessment that focuses on clarifying the areas of strength and areas of growth from one's direct reports, peers, and supervisors.

The 360-Degree Feedback Instrument is a straightforward online tool that only takes about 15 minutes to complete. It is easy to administer, and its multi-rater strategy and combination of scaled and open-ended items gives a true sense of one's leadership. Full color reports with numerical and graphical data are provided. Personal Development Worksheets and comparison data are included to allow individuals to make the most of the data.

Our Multi-Rater system offers:

- Reduced bias due to a larger respondent pool
- A balanced view from different perspectives
- Honest responses due to anonymity
- Assessment by those who know and work closely with the individual
- Present a fuller, multi-dimensional picture of the individual

Contact the Survey Office for more information.

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Appendix

Additional items

- Higher Education Additional Items
- K-12 Additional Items
  Government/Non-Profit Additional Items
- Remote Work/COVID Additional Items
- DE&I Additional Items

Promotional Materials

- Emails:
  - Higher Education promotion email
  - Generic Promote Participation Sample Email
  - Generic Promote Participation Sample Email 2
  - Example Emails and Reminder Email
- Flyer:
  - Example 1
- Video:
  - Department of Health and Human Services: https://vimeo.com/680597456
  - SORM 2019 https://youtu.be/sblWL3c6NF4
  - DXDMV 2022 https://youtu.be/m4SOXB0sOYs
  - Sample video script

Survey Items

- Constructs evaluated
- Survey items
- set up sheet
- sample survey

Employee List

- Employee list with categories
- Employee list without categories
- Example Employee List

Executive Summary

- Sample Executive Summary
- Executive Summary Video
- Sample Organizational Category Breakout Report
- OC Breakout Video

Excel Files

- Conditional formatting

- Finding the highest and lowest scoring items
- Percent of agreement and disagreement

Next Steps

- Texas Parks and Wildlife Division Case Study
- Importance of Employee Engagement.
- Action Plan Guide
- Action Plan Table
- Focus Group Resource Guide

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