

Survey Results Rollout Toolkit

Transparent Communication of Data



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You are only as good as the people you lead –

***The best places to work support the best teams
to achieve high performing results!***

Introduction to the Survey Results Rollout Process

Healthy organizations consistently monitor the work environment and satisfaction of internal and external stakeholders. Usually, this is accomplished with the use of surveys administered to varying stakeholders of the organization. Many organizations administer surveys. The value is found in how well leaders *share the data* with their teams and stakeholders and how well leaders *communicate the action* that will be taken based on feedback from the survey data. This transparent communication process is the **survey rollout process**.

The rollout process cascades throughout an organization. The senior executive rolls out the organizational results to all people working within the organization. The senior leaders then roll out the results to their units, as well as their direct reports. Then, the unit leaders roll out the unit results to their teams.

Once the survey is complete and the data are collected, we recommend that all organization leaders receive training on how to explain the results of the survey and facilitate the development of an action plan based on the priority areas identified in the rollout meeting(s). The purpose of the training is to support leaders to apply best practices for rolling out the results of the survey and to help all leaders develop key words and actions for the survey rollout meeting they will have with their teams. A successful rollout depends on planning and preparation by leaders.

Six steps exist in the organizational survey results rollout process with each step having associated actions that position teams to achieve positive outcomes and create high performing work environments. As leaders we want to create work environments that provide 1) team members with opportunities to achieve at their highest potential, and 2) those we serve with the highest levels of services.

Organizational Survey Results Rollout Process

- Step 1: Leader preparation for reviewing results and facilitating rollout meeting.
- Step 2: Employees invited to results rollout meeting.
- Step 3: Senior executive rolls out overall organizational survey results.
- Step 4: Leaders rollout unit results to their teams.
- Step 5: Leaders at all levels create action plans to focus on areas of improvement for the year for their unit.
- Step 6: Leaders invite teams to provide continuous feedback through survey results rollout evaluation.

Step 1: Leader Preparation

Preparing for the Review of Results and the Survey Rollout Process

Before interacting with team members or sharing results in any way, as leaders we need to take some time to mentally prepare ourselves after reviewing the results and prior to rolling out the results with our teams. The discussions at the rollout meetings are not personal; rather the information from these meetings should inform our practice and point us in the direction of continuous improvement.

Leaders often go through Results Processing Phases. It is important to process our personal feelings prior to moving forward with an improvement process.

Results Processing Phases		Thoughts/Feelings
Phase 1:	Deny the data	<ul style="list-style-type: none"> • <i>I know why this score was low.</i> • <i>Only the people with negative attitudes completed the survey.</i> • <i>This is not how all the people really feel.</i> • <i>The survey is flawed.</i>
Phase 2:	Accept the data but think it's someone else's fault or a negative situation caused the results.	<ul style="list-style-type: none"> • <i>The negative survey results occurred because I had to make an unpopular decision.</i> • <i>The timing of the survey administration caused the negative results.</i>
Phase 3:	Accept the data and the issue and think a solution cannot be found.	<ul style="list-style-type: none"> • <i>The poor work conditions will not allow for me to do anything that satisfies people.</i> • <i>There are too many barriers in this organization.</i>
Phase 4:	Accept the data. Accept the problem. Accept the solution.	<ul style="list-style-type: none"> • <i>The results are what they are and provide us with information we can use to engage in a productive discussion that moves us to solutions to improve our work environment.</i>

Preparing for the Survey Rollout Meeting

Our goal is to hold meetings with our teams to provide a summary of results, celebrate wins, and identify areas for improvements. Once we move to accept the data, accept the problem, and accept the solution, we prepare our minds and hearts for the meeting.

Our focus when hosting a rollout meeting is to listen and gather input on solutions. As leaders, we are not the problem solvers in this meeting.

The purpose of the meeting is to ***allow employee involvement in the discussion of the results***. This is our opportunity to facilitate a conversation with our teams and allow them to identify priorities and strategies for reaching the priorities. To prepare ourselves for the meeting we keep the following in mind:

- **Listen, probe, listen**
- Avoid debating the data
- Ask open ended questions
- Allow silence
- Encourage everyone to participate
- Do not agree to anything until you are sure you can do it

Preparing to be Proactive

Our best bet in being able to facilitate the rollout meeting in a productive way is to be a proactive rather than reactive thinker.

Reactive Traits	Proactive Traits
<ul style="list-style-type: none">• Kill the messenger• The data must be wrong• It's not my fault• I can't believe they think I am this bad• Staff just don't understand• If a staff member is unhappy it's because they choose to be – I can't control that!	<ul style="list-style-type: none">• Willing to hold up the mirror• This is an opportunity to improve leadership skills• I'm not perfect I can always get better• Collaborative team effort will improve satisfaction• Fixing perceptions and processes will improve satisfaction

We want our teams to be engaged and satisfied at work. It makes our work more fulfilling. What we know is that most employees want leaders who care about them, listen to them, and help them develop and grow. The employee engagement survey and the rollout process provide leaders with an opportunity to do just that for our teams.

Step 2: Invitation to Rollout Meeting

Once the survey is complete and the data are collected, the senior executive should model the results rollout for all district leaders. The first step of the process is to invite team members to the Survey Results Rollout Meeting. A sample message follows for inviting team members to engage in this process. The sample uses key words and key actions to kick off the employee engagement survey results rollout process. Our goal is to communicate the “why, what, and how” for rolling out results.

- Why – the input from team members is important to create a high performing work environment where everyone has an opportunity to achieve his or her potential
- What – team members are invited to a meeting to review the results, provide input, create solutions, and determine priority actions for the year
- How – scheduled meetings are held to apply an organized process for rolling out results and creating improvement action plans

Dear Team,

At _____, we are focused on ways to engage our people and to support our teams to achieve at their highest potential. To get a sense of where we are with employee engagement, we asked an external group to administer and analyze an employee engagement survey. The initial results provide baseline data that we will use to judge our improvements during the year and at the end of an academic year. We now have the baseline measure and want to share these results with you.

Our goal is to use these results to talk about our strengths and areas that need improvement and to arrive at some actionable priorities to focus on this year. We have scheduled three opportunities for you to participate in one of the survey rollout meetings. Please select from one of the following three options: [List three options that provide a variety of times for meetings and include an explanation of how staff is to sign up for particular meetings. This is one option for scheduling the meetings. Conducting only one meeting is another option for leaders.]

Your input is important for helping our unit achieve high performing results. To do so, we will work together to create actions that are most important to our team members that support a productive and engaging work environment. I look forward to celebrating our identified strengths and developing a plan to address our improvement needs.

Thank you for helping us continue our journey of excellence.

(NAME)

Below is a sample agenda for a results rollout meeting in which the leader follows the survey results rollout process. Notice that other items are also part of the agenda.

Goal: Roll out the survey results and prioritize actions for improvement.

Agenda

8:00AM to 8:30AM	Presentation of organization survey results
8:30AM to 9:00AM	Discussion of three highest unit items
9:00AM to 9:45AM	Discussion of three lowest unit items
9:45AM to 10:15AM	Prioritize improvement action ideas
10:15AM to 10:30AM	Discussion; Take-Aways; Next Steps

Step 3: Senior executive rolls out organizational results

The purpose of the survey rollout process is to give our teams an opportunity to provide input and take part in improvements. As leaders, we achieve this purpose by using the “right words at the right time in the right way.”

Before directors and managers roll out their results, we suggest the senior executive roll out the overall organizational results to the senior team and all leaders. The senior executive must also communicate the steps that will be taken by each leader in the rollout process. This not only makes the senior executive a visible part of the process, but also manages up the leaders and sets them up for success.

To assist senior executives with rolling out the survey results, the following information provides some specific actions for leaders to follow for the Employee Engagement Survey Results, with sample key words associated with each action.

ACTIONS	SAMPLE KEY WORDS
<ol style="list-style-type: none"> 1. Introduce and set up the meeting: <ul style="list-style-type: none"> • Begin the session on a positive note. • Thank your team members for caring enough to fill out the survey, attend the session, and participate. • Be open and genuine/sincere to demonstrate your commitment to taking action based on the results of the survey. 	<p><i>“On (Month/Year) the Employee Engagement Survey was sent to all employees. Employees answered questions about how they felt about their work environment in the school district. XX% of district employees completed the survey. Thank you for caring enough to complete the survey and for responding so powerfully. I also appreciate you being here today to discuss the results together and your continued participation in the process.</i></p> <p><i>The goal of the survey was to determine how you feel about your job and your work environment so that we can be more effective in planning and future decision making.</i></p> <p><i>This was a confidential process by using an outside group to facilitate, implement, and monitor the survey and collect all data. We did not have access to individual responses, only the results as provided in the reports we will be using today.</i></p> <p><i>The results of this survey are very valuable to continue ensuring we have the best people in this district and that you are satisfied with your work and work environment.”</i></p>

<p>2. As a review, present the overall organization results. Also, use this time to provide an overview of how the report is organized.</p> <ul style="list-style-type: none"> • Note the overall mean. • Note some of the highest scored items for the organization. • Notes some of the lowest scored items for the organization. 	<p><i>“Our focus today is on our district results. Before engaging in our conversation about our results, I am providing a review of the overall organizational results. Our report shows item means and organizational results. Our report also provides the top and lowest item scores on the survey. The overall mean for _____ (the organization) was _____ and percentage of participants was ____.”</i></p> <p><i>AFTER YEAR ONE – “Our overall mean this year compared to last year has improved/declined by ____.”</i></p>
<p>3. Present items for your organization.</p> <ul style="list-style-type: none"> • Present the overall mean of the survey 	<p><i>“We will use the report as a tool to engage in a conversation with each other about the results. Now let’s look at the specifics and identify ways to improve”</i></p>
<p>4. Engage the team in a conversation about the highest scored items.</p> <ul style="list-style-type: none"> • In your report, refer to the results of the highest ranked items • Choose several items or themes associated with the items and ask your team members why they believe a particular item or theme is scored as one of the higher items. Engage in a conversation about one item/theme at a time. • Taking this step helps you and your team understand “what right looks like.” 	<p><i>“Let’s look first at the items that you scored highest, as a senior leadership team. If we look at (select an item or category of items), why do you believe this item/theme is one of the higher scored items? What is occurring that makes this higher score occur?”</i></p>
<p>5. Engage your team in a conversation about the lowest scored items.</p> <ul style="list-style-type: none"> • In your report, refer to the results of the lowest ranked items. • Choose several items or themes and ask your team members why they believe a particular item/theme is scored as one of the lower items. Listen and have someone take notes on chart paper. 	<p><i>“As we review the lowest scored items, there are some areas where we have more control of than others. All input is important and I want to spend the majority of time on things I or we can do to improve. So let’s review the top areas of concern. I want us to do two things. I want your input on why these items are scored lowest and, just as important, I would like for you to offer some solutions on things we could do to improve the work environment.</i></p>

<ul style="list-style-type: none"> For each item/theme, ask your team for several solutions that would improve this area of focus. Make sure you spend time on solutions that you and your leadership team can turn into action items. Spend time discussing problems but focus on solutions. The staff should make suggestions for solutions; the leader should listen. 	<p><i>Here is one area you identified as a lower scored item. To make sure I capture your thoughts, I've asked _____ to write them on the chart paper.</i></p> <ul style="list-style-type: none"> <i>Why do you believe this item/theme is one of the lower scored items? What is occurring in our department that makes this lower score occur?</i> <i>What are some things we could do to improve in this area?"</i> <p>Select one or two more and follow the same process.</p> <p>If results are low and you expected them to be higher after working on actions in the past year you may say something like this:</p> <p><i>"I want to tell you I am disappointed that our results did not improve in this area. I'm committed to working with our team to create a great work environment and need your input to know the best actions to take to support our team. Help me understand, what did you specifically mean when you scored item__ a __? What things can I or we do to improve this area?"</i></p>
<p>6. If you need additional information, ask the staff to look at any other items as they review the solutions presented. If not, proceed to setting priorities.</p>	<p><i>"I want to make sure that we've covered the areas that are most important to you. I also want to continue to focus on those areas we can directly work on. When looking at other items on the survey are there any additional concerns?"</i></p>
<p>7. Prioritize the one or two solutions to focus on.</p> <ul style="list-style-type: none"> Allow the team to add or delete from the list of solutions. Ask the group to identify the most important solutions to focus on. Give each team member a sticky dot and ask the members to place the dots on the top 3 solutions/areas to improve. Explain that this information will be used to create an Improvement Action Plan. 	<p><i>"The priorities and suggestions for improvement will be incorporated in an action plan within the next 2 weeks. I will send a copy to the entire team. If you have additional input or questions at that time please direct them to me.</i></p> <p><i>You see a list of solutions/priorities on the chart paper. Take your three sticky dots and place them on the three things you think are most important for us to work on. We will compile the information and create an action plan that aligns to our team members' input."</i></p>

<p>8. Close the meeting by thanking your team and asking them to evaluate the meeting by rating the meeting on a scale of 1 to 10 and provide any comments.</p>	<p><i>“Today, you all have provided valuable input on our strengths, areas where we need to improve and some specific actions we can do to make this a better place to work. By _____, I will share our action plan with you.</i></p> <p><i>As you can see there is a great deal to be proud of and challenging work ahead. I am grateful for the support you have and will continue to show as we move ahead. I look forward to rolling up my sleeves and working shoulder – to – shoulder with you to make our organization the best it can be.”</i></p> <p><i>Please use this opportunity to evaluate this meeting by completing the meeting evaluation form and place it on the back table when you leave today.</i></p> <p><i>Thank you for your valuable time and input.”</i></p>

Step 4: Leaders Rollout Results to Staff

Once the senior executive has shared the organizational results with everyone in the organization and has introduced the rollout process, the leaders begin to schedule meetings with their particular teams to share the data. Everyone in the organization is invited to attend rollout meetings hosted by their leaders. The senior leaders work with their respective leadership teams to ensure that this occurs.

The rollout process can occur in one or more meetings depending on a leader's preferences. Some leaders have small enough teams to complete the rollout process with all team members. Others may schedule several meetings with smaller groups or one large meeting with small group activities. Leaders have different preferences and styles. We suggest leaders use the approach that best fits their style and meets the team's needs.

To assist leaders with rolling out the survey results, the following information provides some specific actions for leaders to follow for the Employee Engagement Survey Results, with sample key words associated with each action.

ACTIONS	SAMPLE KEY WORDS
<p>1. Introduce and set up the meeting:</p> <ul style="list-style-type: none"> • Begin the session on a positive note. 	<p><i>“On (Month/Year) the Employee Engagement Survey was sent to all employees. Employees answered questions about how they felt about their work environment in the organization. XX% of employees</i></p>

<ul style="list-style-type: none"> • Thank your team members for caring enough to fill out the survey, attend the session, and participate. • Be open and genuine to demonstrate your commitment to taking action based on the results of the survey. 	<p><i>completed the survey. The participation for our unit was ____ or about ____%. Thank you for caring enough to complete the survey and for responding so powerfully. If you did not have an opportunity to complete this survey, I still appreciate your participation in the process and your time today to discuss the results together.</i></p> <p><i>The goal of the survey was to determine how you feel about your job and work environment so that we can be more effective in planning and future decision making.</i></p> <p><i>This was a confidential process, using an outside group to facilitate, implement, and monitor the survey and collect all data. We did not have access to individual responses, only the results as provided in the reports we will be using today.</i></p> <p><i>These survey results are very valuable for ensuring we have the best people and that you are satisfied with your work and work environment.”</i></p>
<p>2. As a review, present the overall organization results by referring to the message for the senior executive.</p> <ul style="list-style-type: none"> • Note the overall mean. • Note the three highest scored items for the organization. • Notes the three lowest scored items for the organization. 	<p><i>“Our focus today is on our unit results. Before engaging in our conversation about our results, I am providing a review of the overall organizational results. This will help us see how our overall and item means compare to the organizational results. The overall mean for ____ (the organization) was ____ and number of participants was ____.”</i></p> <p><i>AFTER YEAR ONE – “Our overall mean this year compared to last year has improved/declined by ____.”</i></p>
<p>3. Present items for your unit.</p> <ul style="list-style-type: none"> • Present the overall mean of the survey and how it compares to the organizational mean. 	<p><i>“Now let’s look at the specifics of our own unit, how we compare with the organization, and identify ways to improve. The overall mean for the unit was ____ and the number of participants was ____.”</i></p>

<p>4. Engage your team in a conversation about the highest scored items.</p> <ul style="list-style-type: none"> • Refer to the results of the highest ranked items. • Show the three highest scored items and ask your team members why they believe a particular item is scored as one of the higher items. Engage in a conversation about one item at a time. • Taking this step helps you and your team understand “what right looks like.” <p><i>Note: Remember to remain in your listening leader stance, using neutral language, and thanking participants for their feedback.</i></p>	<p><i>“Let’s look first at the items that you scored highest. If we look at (select an item or category of items), why do you believe this item is one of the higher scored items? What is occurring in our department that results in this high score? How can I, as a leader, help to maintain a high score in this area?”</i></p>
<p>5. Engage your team in a conversation about the lowest scored items.</p> <ul style="list-style-type: none"> • Refer to the results of the lowest ranked items. • Show the three lowest scored items and ask your team members why they believe a particular item is scored as one of the lower items. Listen and have someone take notes on chart paper. • For each item, ask your team for several actions that would improve this area of focus. Specifically, ask what would be happening if the score on this item was higher. • Spend time discussing the items but focus on actions for improvement. The staff should make suggestions for actions; the leader should listen. 	<p><i>“As we review the lowest scored items, there are some areas where we have more control than others. All input is important and I want to spend the majority of time on things I or we can do in this unit to improve. Let’s review the top areas of concerns. I want your input on why these items are scored lowest and I would like for you to offer some solutions on things we could do to improve the work environment. I’m committed to growing as a leader and am grateful for your input today.</i></p> <p><i>Here is one area you identified as a lower scored item. To make sure I capture your thoughts, I’ve asked _____ to write them on the chart paper.</i></p> <ul style="list-style-type: none"> • <i>What could occur in our department that would improve the work environment?</i> • <i>What are some things we could do to improve in this area?”</i> <p>Select one or two more and follow the same process.</p>

<p><i>Note: Remember to remain in your listening leader stance, using neutral language, and thanking participants for their feedback.</i></p>	<p>If results are low and you expected them to be higher after working on actions in the past year you may say something like this:</p> <p><i>“I want to tell you I am disappointed that our results did not improve in this area. I’m committed to working with our team to create a great work environment and need your input to know the best actions to take to support our team. Help me understand, what did you specifically mean when you scored item___ a ___? What things can I or we do to improve this area?”</i></p>
<p>6. Prioritize the one or two actions to focus on.</p> <ul style="list-style-type: none"> • Ask the group to identify the most important actions to focus on. Give each team member a few sticky dots and ask the members to place the dots on the top 3 actions/areas to improve. • Explain that this information will be used to create a survey Improvement Action Plan. 	<p><i>“We will now take some time to narrow the actions we have identified. The priorities and suggestions for improvement will be incorporated in a 1-2 item action plan within the next 2 weeks. I will send a copy to all employees. If you have additional input or questions at that time please direct them to me.</i></p> <p><i>You see a list of actions/priorities on the chart paper. Before moving on, is there anything else we should add to our list? Take your three sticky dots and place them on the three things you think are most important for us to work on. We will compile the information and create an action plan that aligns to our team members’ input.”</i></p>
<p>7. Close the meeting by thanking your team and asking them to evaluate the meeting by rating the meeting on a scale of 1 to 10 and provide any comments.</p>	<p><i>“Today, you all have provided valuable input on our strengths, areas where we need to improve and some specific actions we can do to make this a better place to work. By _____, I will share our unit action plan with you.</i></p> <p><i>As you can see there is a great deal to be proud of and challenging work ahead. I am grateful for the support you</i></p>

have and will continue to show as we move ahead. I look forward to working shoulder – to – shoulder with you to make our unit and organization the best it can be.”

Please use this opportunity to evaluate this meeting by completing the meeting evaluation form and place it on the back table when you leave today.

Thank you for your valuable time and input.”

As leaders, once you have hardwired this process and are more experienced with applying it, we recommend that you add a question as you end the meeting. Ask the team - *Are there specific actions I could take that would improve my leadership to the degree that if you were to fill this survey out again, you would rate me a 5?”*

Step 5: Improvement Action Plans (IAPs)

The prioritized solutions from the rollout meeting are used to create an Improvement Action Plan. The IAP includes 1) an annual goal, 2) a priority of focus from the rollout meeting input, 3) action steps to achieve the goals, 4) progress monitoring of the actions, and 5) the person(s) responsible for the action. The senior leaders create an IAP at the organizational level that focuses on organizational goals. The unit leaders create unit IAPs that focus on the priorities identified from the rollout process with their teams.

Once the action plans are completed, they can be posted on the organizational web portal so that all people in the organization can see the positive work being applied to create a high performing and supportive work environment. Also, leaders communicate the progress being made toward the actions items by including the IAP on our meeting agendas or including the plan in our existing communication processes. An example of an Employee Engagement Improvement Action Plan follows.

Pillar	Annual Goal	Priority	Action Items	Progress Results	Responsible Person
People	Increase performance level on Employee Engagement Survey from 3.75 to 3.85	Make efficient use of time in staff meetings	Have agenda 24 hours in advance of all meetings	(Yes/No) Ballot following team meeting	Unit leader and team leaders
			Start and stop meetings on time	Pulse Check Survey	Unit leader and team leaders
			Assign a time keeper for all meetings	Stoplight Vote (Green, Yellow, Red)	Unit leader and team leaders

Step 6: Staff Evaluates Rollout Meeting

We want to continue the positive momentum by focusing on our action plan each month and by doing a pulse check along the way to gain feedback about the survey rollout process. We suggest the organization have all team members complete a Survey Rollout Process Feedback/Input form after the survey results rollout meeting. Leaders should discuss feedback about the survey results rollout process during a supervisor meeting, with a focus on how to improve the process. Executive leaders should use this additional feedback to coach all leaders for continued improvement in the rollout process. The process feedback data can also be shared at team meetings, including modifications to the rollout meeting, to keep the input and feedback process moving in a positive direction.

Survey Rollout Process Feedback/Input Form					
UNIT NAME _____					
Directions: Please answer the following questions by circling the number that best represents your opinion.					
<ul style="list-style-type: none"> I completed the survey. YES NO I attended a survey rollout meeting. YES NO 					
	Strongly Agree	Agree	Somewhat Agree	Disagree	Strongly Disagree
I received the data from the survey in an open manner.	5	4	3	2	1
I was given an opportunity to provide input and feedback during the meeting.	5	4	3	2	1
We are focused on areas of improvement.	5	4	3	2	1
What's working well with survey rollout process and action planning?					
What are the challenges with the survey rollout process and action planning?					

Summary and Final Tips

The key is *how well you share the data with the people working in the organization, how you communicate the action based on their feedback, and the follow through for continuous improvement through the action plan.* This process can be customized, but these actions create a systematic approach to drive employee engagement and results across the organization.

The following are some additional tips to consider as leaders roll out survey results.

- Seize the opportunity to report all future positive change as a result of the survey.
- Share survey success stories at town halls/ board meetings/community meetings.
- Provide a survey update in a section in your organizational newsletter or other forms of internal communication. Create a category -- “You Asked For It, We Listened”. Connect the dots as often as possible to show actions that are a direct result of employee input.
- Keep survey participation results high to sustain positive momentum. Post response rates and thank employees for participating by letting them know their input is valuable.
- Post Improvement Action Plans for all units so everyone in the organization can see the positive work going on in the organization.
- Finally, create a checklist for leaders to help ensure they have the details needed to engage in a successful survey rollout process. The checklist may include items such as the ones listed.

Checklist		
Item	Date	How
Invitation to meeting sent to all team members with time, place, purpose, etc.		
Have a process for team members to sign up or a way to make sure every employee has an opportunity to participate.		
Meeting room set and all resources prepared for the meeting.		
Top three priorities for improvement identified		
Follow up Improvement Action Plan developed		
Follow up Improvement Action Plan communicated to team members and posted on the organizational web portal.		
Plan for continuous communication with team members is in place.		