

Charity Pulse Staff Survey

2021 Guidance Notes for charities

Background

At Birdsong we believe that staff surveys are a powerful way for an organisation to keep in touch with what their people are thinking and feeling. We have been running staff surveys across the UK voluntary sector since 2004 and have developed a range of services to enable sector leaders and HR professionals to gather the honest opinions of their people.

At the core of our approach is *Charity Pulse*, a voluntary sector staff satisfaction survey developed by Birdsong. The survey illuminates the issues that matter most to charity staff through a set of carefully crafted questions.

These Guidance Notes provide key information as well as the 2021 survey questionnaire itself. They also give information about the updates that have been made to the survey for 2021.

Key information

Important dates

Charities can run a *Charity Pulse* staff survey at any time of year but, each year in early-Spring, we provide the opportunity to run the survey at a specially reduced rate.

The Spring 2021 *Charity Pulse* survey is open from **Monday 1st March to Friday 2nd April**.

If you would like your charity to take part during this main survey period, please register by **Friday 5th February 2021**.

After the survey has closed we analyse the results, compile the new benchmark and prepare the reports for each charity. You will receive your reports by **30th April 2021** at the latest.

Pricing

The core cost of running the survey and receiving the Overall Results report is **£375 + VAT** during the early-Spring survey period, or **£475 + VAT** at other times of year.

In addition to the core cost, there is a pricing structure set out in **Appendix 2 of this document** which allows you to add 'open questions' to your survey and/or select sub analysis options. The same price structure applies to both staff and volunteer surveys and does not increase with numbers of respondents. We have not increased our pricing since 2018.

Registering to take part

To get the process started **you need to register online**. To do this visit our website: birdsong.co.uk - the 2021 registration will open in January.

Choosing the right survey options for your charity

Please read these Guidance Notes in full before registering – they give you an overview of what’s involved and will also help you ensure that you are making the right registration selections for your charity to best suit your needs.

You can also view and try out a test version of the survey and look at example reports online.

Who can take part

We have a Charity Pulse Survey for paid staff only, and one that is more specific to volunteering. The surveys contain enough cross-over to enable effective and meaningful comparison of data if you wish for both your staff and volunteers to take part. The versions of the survey (updated for 2021) are included as **Appendices 1a and 1b of this document**.

Overall Results reports and our benchmarking

The main output of the survey process, included in the core cost of your survey, is a graphical Overall Results report comparing your charity’s responses with the *Charity Pulse 2021* benchmark. The *Charity Pulse* benchmark is compiled from the last three years of responses to over 200 Birdsong staff surveys, involving over 25,000 individuals working in charities.

The Overall Results report also highlights your charity’s top and bottom performance areas, giving an *at a glance* view of your best and worst areas of staff satisfaction. You will also receive an overall engagement indicator as part of the survey headlines section of your report.

Optional reporting

You can further analyse your results and customise your survey by choosing from the following comparison reports:

- Managers / Non-managers
- Length of service
- Location
- Department
- Previous years (one or two years)
- Top Performers benchmark
(for charities wanting to challenge themselves a little more)

You can also specify custom sub-analyses that are unique to your charity. This could be, for example, to analyse the responses from different job types or according to home-working or office-working status.

Please note that if you specify a sub-analysis that has more than three categories (for example, you specified a department sub-analysis and there are four or more departments), then the report will be produced in a tabular rather than graphical form.

Please do not identify individual categories that are likely to have fewer than 10 respondents as this could compromise the anonymity of responses.

Verbatim Comments

You can also **add open questions to the survey**, so that respondents can enter narrative responses. Open questions can be useful because they allow for more detailed information from respondents or for you to raise specific topics that are important to your charity.

You cannot change the wording of the opinion questions in the survey - to facilitate the benchmarking - but you can choose the wording of your open questions.

Changes to the Charity Pulse Survey for 2021

Birdsong is committed to ensuring that our surveys and reporting services provide charities with the most pertinent data in user-friendly formats. In line with this, we developed a set of enhancements to the survey for 2021.

These include an increased focus on staff well-being, more opportunity to measure perceptions of inclusion and diversity, further analysis of staff engagement levels and the production of a shorter volunteer-version of the survey. We have also enhanced the survey opinion scale to improve clarity between neutral-opinion and no-opinion responses.

These changes have been prepared in such a way as to allow for continued and unhindered comparison with previous years.

The updated questionnaires are set out in **Appendices 1a and 1b of this document**.

Pandemic-related working circumstances

Many of our charity clients are finding a continued need to check how staff have adjusted to changes in working circumstances necessitated by the Covid-19 pandemic.

We have designed a set of survey questions which can be added to *Charity Pulse* to help gauge how staff are navigating the ongoing situation at work. The questions are set out in **Appendix 1c on page 10**. Results for this (optional) extra section can be compared in groups by working status (i.e. working wholly at home vs coming into the workplace/using a blend) if applicable.

Running the survey

Before the survey launches

The survey questionnaire will be completed via a web-based survey link unique to your charity, which you pass on to your staff when the survey goes live. Before you launch, we will provide you with your online link to test and check that everything is as you expected.

Give your staff and/or volunteers plenty of advance notice that the survey will be taking place and tell them why you would like them to take part. You will need to carefully consider how you want to word the email that accompanies the survey link. We provide some example wording that you can use for this prior to your launch.

Make sure you've arranged for all staff to have easy access to the internet* during the survey live period and that they have expressly received encouragement from their immediate manager to spend ample time taking the survey.

*(*A pdf for you to print out paper copies of the questionnaire can be provided if needed).*

During the survey

A three-week period is an ideal length of time for your survey to be available to your staff, but you may wish to adjust this to suit the size of your organisation. We will provide you with a live reporting link, so that you can check the progress of your responses at any time.

Encourage responses by publicising the survey through, for example, notice boards, staff forums/online platforms and simply by asking managers to encourage their teams to take part. It is also helpful to send out reminder emails to further encourage response.

How we use your data

Each charity's summary results will be included in Birdsong's *Charity Pulse* benchmark. The top 40 surveys' summary results will be included in Birdsong's *Top Performers* benchmarks.

Confidentiality

Our benchmarks do not identify individual charity results. Each charity's results will be confidential to them. We never release information that could identify an individual.

If you select the use of 'open questions' in your survey, some respondents may choose to write something that could identify them. It is a good idea to tell your staff who at your organisation will see the survey data so that you're clear with them on this. However, you can also assure them that the comments made will not be attributable to any individual unless they choose to make them so in their writing (i.e. by naming themselves or their specific job role).

Our data management and security policy on our website (birdsong.co.uk) covers the area of anonymity for survey respondents further – and you will be asked to view and agree to our privacy notice, and also to our GDPR policy, as part of the registration process for all our surveys.

Receiving your results

We will get your survey reports to you as quickly as possible after your survey has closed - usually within three weeks. To maintain confidence in the process, plan to make the survey results available to your people at the earliest opportunity, highlighting the most significant findings - both positive and negative.

We believe that a staff survey is just the beginning of a journey to improve staff satisfaction, engagement and motivation. The results will illuminate key areas for internal conversations and further openness within and across teams.

To maximise the motivational impact of the survey, take some prompt action in response to the findings. If appropriate, ask staff for their views on which are the most important and/or urgent areas for improvement. Be honest about what you can and cannot change.

Further analysis and help

We can produce additional reports that further analyse and interpret your data, examples of these include:

- **Findings report** - An executive summary report highlighting key variances, trends, strengths and areas for further investigation.
- **Comments Summary Report** - A written report summarising the comments and suggestions made by staff.

Birdsong has considerable experience of supporting charities following staff surveys and some charities find it useful to have further involvement from us after they receive their results.

We can also offer personal development and personal growth coaching for chief executives – please contact us if this is something you are interested in.

Any Questions?

If you have any queries or would like to discuss any aspect of the *Charity Pulse* Survey process, please contact: Emma Howard at **emma@birdsong.co.uk** or on **01858 525258**.

Thank you for your interest in the Birdsong *Charity Pulse* Survey 2021. If you have decided to take part, we look forward to working with you.

Appendices:

Pages 7 – 14 contain the following further information:

- **Appendix 1a:** Charity Pulse 2021 Questionnaire for Staff
- **Appendix 1b:** Charity Pulse 2021 Questionnaire for Volunteers
- **Appendix 1c:** Pandemic-related (optional) survey section
- **Appendix 2:** Survey Costs – a pricing table for all options
- **Appendix 3:** FAQs (including more information about the changes for 2021)

Communication and leadership

1. I understand what this charity wants to achieve as an organisation
2. I feel well informed about what is happening within the charity
3. Communication between different teams / departments is effective
4. The Chief Executive and Leadership Team communicate effectively with staff
5. The Chief Executive and Leadership Team are committed to making this charity a great place to work
6. I have confidence in the Chief Executive and Leadership Team
7. I have confidence in the Trustee Board

Ways of working

8. This charity acts fairly in its dealings with everyone (regardless of age, sex, ethnic background, religion, sexual orientation or disability status)
9. This charity makes best possible use of supporters' time and money
10. This charity is doing everything it can to reduce its impact on the environment
11. This charity's processes and procedures help me to do my job effectively

Your job

12. I enjoy the work I do
13. I enjoy working with the people in this charity
14. I feel like I am making a difference
15. My workload is manageable
16. I do not feel under pressure to work long hours
17. I am happy with the flexible working practices here
18. I am not concerned about my job security
19. My pay is competitive in comparison to people doing similar work in the charity sector
20. Pay is handled fairly here

Your well-being

21. I never feel overwhelmed by stress at work
22. This charity actively encourages employees to improve their physical and mental well-being
23. In the last year I have not experienced bullying or harassment at work
24. I have access to appropriate emotional and mental health support at work when/if I need
25. I would feel able to raise a personal or well-being issue here if I needed to

26. I am comfortable being myself at work

27. My morale at work is high

People management

28. I am clear about what is expected of me in my job

29. I feel appreciated here

30. My views are listened to and valued

31. I am trusted to do my job and / or make decisions that are relevant to my role

32. My immediate manager gives me clear feedback on my work

33. I feel well supported by my immediate manager

34. My immediate manager demonstrates the charity's values in the way that they work

Training and development

35. This charity makes best use of my abilities

36. I receive the training / development I need to do my job well

37. I am happy with the personal development opportunities here

38. I feel supported in developing my career

Overall

39. Overall, I am satisfied with my job

40. I am proud to work for this charity

41. I believe in the aims of this charity

42. I would recommend this charity as an employer

43. I intend to be working for this charity in a year's time

You cannot change the wording of the opinion questions in the survey - to facilitate the benchmarking - but we always offer the opportunity to add 'open questions' at the end of the survey and these can be worded in any way that you wish.

Note:

The staff and volunteer surveys contain enough cross-over to enable effective and meaningful comparison of data if you wish for both your staff and volunteers to take part.

Appendix 1b – Charity Pulse Volunteer questionnaire 2020

Note: The staff and volunteer surveys contain enough cross-over to enable effective and meaningful comparison of data if you wish for both your staff and volunteers to take part.

Communication and leadership

1. I understand what this charity wants to achieve as an organisation
2. I feel well informed about what is happening within the charity
3. This charity is committed to making this a great place to volunteer

Ways of working

4. This charity acts fairly in its dealings with everyone (regardless of age, sex, ethnic background, religion, sexual orientation or disability status)
5. This charity makes best possible use of supporters' time and money
6. This charity is doing everything it can to reduce its impact on the environment
7. This charity's processes and procedures help me to do my volunteering work effectively

Your volunteering work

8. I enjoy the work I do
9. I enjoy volunteering with the people in this charity
10. I feel like I am making a difference
11. This charity is flexible about how much time I can give

Your well-being

12. I never feel overwhelmed by stress when volunteering for this charity
13. Volunteering for this charity contributes positively to my health and well-being
14. In the last year I have not experienced bullying or harassment when volunteering here
15. I would feel able to raise a personal or well-being issue here if I needed to
16. I am comfortable being myself here
17. My morale when volunteering here is high

Volunteer management

18. I am clear about what is expected of me in my volunteering role
19. I feel appreciated here
20. My views are listened to and valued
21. I am trusted to do my volunteering work and / or make appropriate decisions if needed
22. I get the support I need from my supervisor to enable me to do my work well
23. My immediate supervisor demonstrates the charity's values in the way that they work

Training and development

- 24. This charity makes best use of my abilities
- 25. I receive the training / development I need to do my work well
- 26. I have the opportunity to develop new skills here

Overall

- 27. Overall, I am satisfied with my volunteering experience
- 28. I am proud to volunteer for this charity
- 29. I believe in the aims of this charity
- 30. I would recommend this charity as a place to volunteer
- 31. I intend to be volunteering for this charity in a year's time

The organisation's response to the pandemic

1. This charity is doing a good job in managing any continued changes and challenges that have emerged from the Covid-19 pandemic
2. I trust this charity's leaders to make decisions that protect me and my colleagues
3. The organisation has communicated well regarding any changes to working circumstances and what they mean for me
4. If applicable, the organisation has supported me to balance my work and my childcare / caring / other responsibilities outside of work during the pandemic
5. The pandemic has not decreased my desire to work for this organisation

Working from home (shown if applicable)

6. When I am working from home, I feel trusted to do my job to the best of my ability
7. I have the tools I need to work effectively from home
8. Working from home has increased my productivity
9. When working from home I feel able to communicate and/or collaborate well with colleagues if I need to
10. I feel that I have adjusted well to working from home

Coming into the workplace (shown if applicable)

11. I recognise that it is necessary for me to come in to work as required, rather than to be fully working from home
12. Things are in place for me to socially distance and still work effectively when carrying out my role in the workplace
13. When I'm in the workplace I am able to communicate and/or collaborate well with colleagues who are working from home if I need to

Well-being through the pandemic

14. My mental health and well-being is good at the moment
15. I feel safe carrying out my role
16. It feels like a caring organisation for staff here at the moment
17. I feel well supported by my immediate manager through the challenges caused by the ongoing pandemic
18. Working for this charity has helped me retain a sense of purpose during the pandemic

Furlough / Transition from furlough (shown if applicable)

If you have been furloughed at any point during the pandemic:

19. Being furloughed has not decreased my desire to work at this organisation
20. I have found it easy to adjust back to my role since returning from furlough *[only to show to those not still on furlough]*

Appendix 2- Survey Costs

All the costs detailed below **exclude VAT**, which is charged at the standard rate of 20%.

Core survey cost

Including full set up, support, management of the survey plus Overall Results report with benchmark comparison	£375 £475	Early-spring survey period Other times of year
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Optional comparison reports

Top Performers benchmark	£250	Using our top 40 data sets
Previous years	£200 £250	Two years Three years
Staff / Volunteers	£200	
Managers / Non-managers	£200	
Length of service	£250 – £400	Price range dependent on number of categories:
Location	£250 – £400	
Department	£250 – £400	<i>Up to three £250, up to six £300, up to nine £350, up to 12 £400</i>
Custom sub analyses	£250 – £400	

Optional extra survey sections

Three 'open questions' added to the survey to gather narrative responses	£150	Includes full verbatim comments report
Pandemic-related section of questions, relating to changed working circumstances since March 2020 (i.e. home working etc)	£150	Includes a separate results report and comparison tables (if applicable)
Diversity and Equality section - gathering non-compulsory and anonymous information from your staff about their age, disability status, ethnicity, religion, sex/gender and sexual orientation	£300	Includes a standalone report of all diversity information - <u>not</u> linked to the main survey data

Other services

PDF version of the questionnaire - for printing out paper copies	£50	
Inputting hard copy responses	£3	Per questionnaire
Comments Summary Report	From £375	
Findings report - in-depth narrative analysis with key strengths and recommended areas for further investigation	From £750	Priced in tiers dependent on levels of sub-analysis involved

Can you tell me more about the changes to the survey since last year?

We have enhanced the survey opinion scale to improve clarity between neutral and no-opinion responses.

This means that we have:

- Changed the use of the existing term ‘neutral’ to become ‘neither agree nor disagree’
- Added a sixth option at the end of the scale that allows the respondent to select a ‘don’t know’ answer.

These steps will allow increased clarity between those respondents who are genuinely neutral in their opinion and those who don’t have enough information to answer the question or who feel it is not relevant or applicable to them.

We have strengthened and tightened the survey structure by renewing question-wording.

We have:

- Added a set of new questions to the survey, increasing the focus on staff well-being.
- Significantly reshaped the wording of some existing questions to strengthen their purpose, sharpen clarity and update the terminology used.
- Removed questions that are no longer relevant, that contain some ambiguity, and/or that are superseded by new wording.

We have developed the Overall Results reporting, providing additional insight.

We have added:

- A Birdsong overall staff engagement measure at organisational-level to every Overall Results report (at no additional cost). This will be derived from key indicator questions within the survey.
- A standalone chart to show topic relevance and engagement for survey respondents at organisational level. This will provide charities with numeric information regarding which questions across the survey have not been answered / left blank, and which questions have been answered as ‘don’t know’.

The core survey cost will include this new analysis within the Overall Results survey report at no extra charge. Our pricing has not been increased, for any of the options, since 2018.

We have redesigned our volunteer survey to increase relevance and reduce length, to help encourage a healthier volunteer response rate.

The new volunteer survey is:

- Reduced in overall length and question-topics are streamlined to amplify pertinence to volunteers and volunteering.
- Reworded in relevant areas in line with the updates made to the main staff survey, enabling continued effective comparison of staff vs volunteer data for charities who wish to receive this.

Other FAQs

Is it possible for an individual to take the Charity Pulse survey more than once?

Yes, we do not limit access to the *Charity Pulse* questionnaire. The reasoning behind our approach is as follows:

- The only way to guarantee one survey response per individual is to send out a personalised invitation to each person with a unique link to the survey. We do not favour this approach because it impairs the perception of survey confidentiality, which reduces response rates and inhibits honest feedback.
- The other option to limit multiple responses is through the use of browser cookies. We do not take this approach because it is very easy for participants to get around this by using multiple devices. Furthermore, many server environments delete cookies or prevent them from being used.

If an individual wants to take the survey more than once (and most, of course, do not), it is rarely a critical problem for a charity. They are not precise exercises and your respondents' responses will vary depending on, for example:

- Their mood on the day
- Any significant activities taking place within your charity when the survey is running. For example, reorganisations typically increase concerns about job security.
- External drivers, such as national events.

Staff and volunteer surveys are designed to provide a guide to future organisational development and the response data should be considered in that context.

Do you include partially completed responses in our survey results?

No, we only include survey responses where the respondent has reached the end of the survey. Individuals do not have to answer every survey question (we do not force responses), but they must click on the *Submit* button to provide a valid response. The benefit of this approach is that if a respondent has to leave the survey part way through, they can return to the survey link on another occasion and retake the survey from scratch. By discounting partial responses, we remove the risk of double-counting genuine responses.

How long do you retain returned paper copies?

If you ask Birdsong to data capture survey responses returned on paper questionnaires, we will retain them for three months after the survey has closed and then destroy them.

What information do you keep about me?

We retain your contact details. We only use this information to email you about the annual *Charity Pulse* Survey. If you no longer wish us to hold your details, please email info@birdsong.co.uk, with *Charity Pulse Unsubscribe* in the subject line.