

## Getting the most out of your safety climate survey

This guide will help you conduct a safety climate survey within your team or organisation. It is designed to be used in conjunction with the accompanying document 'Choosing the right safety climate tool for your organisation'.

It is important to use a step-by-step process when administering a climate survey so that the results accurately represent the safety climate and can be used confidently in planning.

You will need to consider the following when administering a safety climate survey:

- Is a survey the best way to consult with workers given your company size?
- How will you encourage employees to take the survey?
- Will employees feel comfortable expressing themselves honestly?
- How will the survey be delivered to employees?
- What privacy and confidentiality provisions do I need to comply with?
- Who will coordinate and support the survey process?
- What response rate is acceptable for your business?
- What data entry requirements will there be?

### Administering a safety climate survey

There are a number of key steps involved in administering a successful safety climate survey.

#### Step 1: Obtain management support

It is critical to obtain commitment from senior managers, middle managers and frontline leaders for the survey project. One way to secure support is to develop a business case that shows management how measuring and improving safety climate can result in significant return on investment. Evidence to support a business case can be found here:

<http://www.safeworkaustralia.gov.au/sites/swa/about/publications/pages/workplace-health-safety-business-productivity>

Aligning the survey with management obligations around due diligence and keeping staff informed about health and safety issues under the *Work Health and Safety Act 2011* is another way to gain management support.

#### Step 2: Determine the communications strategy

Communicating the purpose of the survey and encouraging employees to participate is critical to obtaining a high response rate. Ideally a successful climate safety survey should achieve 60 per cent or above response rate.

Using a variety of communication methods over a long period of time will ensure a broad section of the organisation are aware of the survey. Examples of communication materials and activities to support the survey include:

- pre-survey information pack

- toolbox talk discussion by a supervisor
- poster or flyer
- invitation and reminder emails
- results summary handouts.

General tips to maximise the success of communications include:

- keep information short and to the point
- use simple plain English
- use email subject lines that ask employees for their help or advice
- send survey communications from the highest level of the organisation
- personalise survey invitations and reminders if possible
- talk to people across the company to gauge their reactions to communications and remove any barriers (e.g., no access to a computer)
- use positive and thankful language in all survey invitation and reminder messages
- explain the purpose or reason for doing the survey, ideally referring to the company vision, mission, or values
- ensure leaders at all levels actively promote the survey during team meetings
- provide information about how confidentiality will be maintained.

The attached example 'Safety climate survey communications strategy' will help you plan your approach.

## Step 2: Identify your logistics plan

In order for the survey to be a success and meet project timeframes it is important to develop a logistics plan – how the survey will be delivered. The first consideration is to decide if the survey should be delivered as hardcopy, online, or both.

Method	Advantages	Disadvantages
Online	May save project costs. May save project time. There are less steps to get to the analysis and reporting stages. May reduce anxiety around privacy issues.	Requires technical expertise. May exclude some employees who don't have a computer. Less flexible. Usually done by individuals on their own.
Hardcopy	Can be completed by anyone, anywhere. More control over look and feel of survey form. Can be done readily in groups of all sizes.	Requires manual entry of data before analysis can start. Adds extra time to data collection. May add extra costs to the project. May increase anxiety around privacy issues.

It can be helpful to identify survey coordinators who are responsible for the following tasks:

- obtaining survey materials
- conducting survey administration with worker groups, including explaining the survey process and answering basic questions
- encouraging participation from the team
- collecting completed surveys.

### **Step 3: Train your survey coordinators**

Survey coordinators should read this guide in full, including any templates and examples.

Survey coordinators should complete the survey themselves before starting the process with other employees. They should conduct a role play or rehearsal of the survey administration process and ensure they understand and can communicate;

- the purpose and benefits of the survey
- privacy provisions of the survey
- how to complete the survey
- who to contact with questions or concerns
- emphasising that participation is voluntary, but the survey is a chance for all employees to contribute their experiences working at the company.

For more information please see the attached document 'Survey Coordinators Tip Sheet'.

### **Step 4: Protect employees' privacy and confidentiality**

Confidentiality is vital to make sure the survey data can be used effectively, and should be maintained through the following actions:

- apart from any demographic questions, no personal information should be recorded on survey materials
- make sure employees have a private space to complete the survey
- if hardcopy surveys are used, provide employees with either a sealable envelope or sealed collection box for their completed forms
- respect employees' confidentiality by only using the survey in a grouped, non-identifiable way that preserves the anonymity of individuals.

Australian businesses have an increased obligation under the *Privacy Amendment Act 2012* to protect the privacy of individuals from who personal information is being collected (including employees). To comply with this obligation, employers must provide a Collection Notification Statement (CNS) at the time of survey data collection. Your responsibility is to ensure that a single copy of the CNS is available during each survey administration session should an employee have questions about privacy provisions.

For more information please visit:

<https://www.ag.gov.au/RightsAndProtections/Privacy/Pages/Privacyreforms.aspx>

## Survey coordinator tip sheet

Collecting high quality survey data is crucial because your leadership team is relying on this information to guide decision-making around health and safety. If employees feel uncomfortable participating in the survey, their information could be less accurate and lead to incorrect decisions being made. Some of the signs of poor quality survey data include the following:

- large amount of missing data
- biased responding where employees might feel they should answer in a particular way
- ambivalent responding where employees give the same answer to every question
- random responding where employees simply pick any answer that comes to mind.

Therefore, it is important to consider how the survey administration can be done in a way that promotes openness and honesty in responses.

### Steps to administer a survey

1. Follow any survey administration instructions closely.
2. Ensure that all survey instructions and questions are read out in full.
3. Make sure employees know that they can ask questions if they do not understand the survey. Explain the survey question using simple language.
4. Make sure employees feel comfortable around the steps to maintain their confidentiality. Answer their concerns directly and reassure them.
5. Give employees extra time to finish the survey if needed.
6. Look for signs that employees do not understand the items, such as distracting or disruptive behaviour, skipping questions, obvious confusion, or asking lots of questions. Consider arranging a separate session for any employees who cannot participate in the survey on their own.
7. If you know that some employees have trouble reading or writing, please consider the following:
  - Ask the employee if they need help to participate, and if so, organise for someone to sit with them to provide support.
  - Consider forming small groups for employees that need more support so help like, reading questions aloud, can be delivered at one time.

## Safety climate survey implementation checklist

Use this checklist during your survey preparation and data collection phases to track important tasks and project progress.

#	Task	Done
1	Talk to project stakeholders (e.g., senior managers, safety team members) to identify research questions and plan survey logistics.	
2	Review suitable survey tools, and make any initial adaptations to improve relevance to your company.	
3	Develop the communications strategy and any supporting materials (e.g., survey poster, flyer).	
4	Select a small group of 6-8 employees from across the business to review the tool and provide feedback. Implement any changes.	
5	Once survey has been approved, create the hardcopy and/or online survey materials.	
6	Supply hardcopy/online survey materials to project stakeholders for review and testing.	
7	Develop the survey administration procedure, providing briefings and training to key personnel as required.	
8	If no issues remain, launch the survey. Monitor survey completion and troubleshoot any issues.	
9	Provide periodic (minimum weekly) response rate updates to senior management and encourage them to drive participation where needed.	
10	Remind key stakeholders about critical communications plan dates and advise them when the survey can be stopped.	

**NOTES:**

## **Example safety climate survey communications strategy**

This plan describes the activities that will support the implementation of a safety climate survey for (insert name of organisation). The plan will outline communication content, timing, and delivery method.

### **Communication objectives**

- Demonstrate our visible commitment to safety by asking employees to participate in the survey and giving them time during their working hours to do so.
- For at least 60 per cent of employees to complete the survey, with all major work groups represented.
- For employees to share honest experiences of safety management and their ideas about how to improve safety.
- Notify employees about the survey purpose and encourage them to participate.
- Explain how to complete the survey.
- Build trust by clearly explaining the survey's purpose and how privacy will be maintained.
- Explain how the survey data will be used by the company and how employees will receive feedback on their participation.

### **Key messages**

As each organisation has their own values and vision for safety, it is important to review the messages below and change as needed.

Examples of key messages include:

- Safety is our first priority.
- We value open and honest feedback about safety.
- Employee confidentiality is important and only grouped and de-identified trends will be reported back.
- The survey will help us to plan our strategy for the future, resulting in a safer and healthier workplace for all employees.
- All employees should participate in this survey, regardless of position or experience, because everyone has a valid experience to share.

## Communication Schedule

#	When?	Activities	Who?
1		Distribute a brief message about the upcoming survey to build awareness and interest.	
2		Display survey flyers and posters in public areas to support initial messaging.	
3		Send the invitation message to all employees.	
4		Periodic reminders to participate.	
5		Final reminder to participate.	
6		Thank-you message that outlines how employees will receive feedback.	
7		Share key results with employees.	

## Key Personnel

Role	Details	Contact Details
Project sponsor		
Project manager		
Survey administrator(s)		
Communications approvals		