

Survey Project Plan

Survey Planning Guide



Action	By Whom	By When	Comments
Tender Process			(if required)
Develop tender documents	Project Manager	12 months prior	
Liaise with Logistics	Project Manager	ongoing	
Send out invitations to tender	Procurement	11 months prior	
Decide on Evaluation Panel	Director, HR	11 months prior	
Contact panel members to evaluate tender	Project Manager	10 months prior	
Send out tender and evaluation documents to panel	Project Manager	10 months prior	
Develop tender evaluation plan	Project Manager	10 months prior	
Chair Evaluation Panel	Project Manager	9 months prior	
Evaluate Tender	Panel	9 months prior	
Referee checking	Project Manager	9 months prior	
Make recommendation & get sign off	Panel Chair	8 months prior	
Notify successful tenderer	Procurement	8 months prior	
Design			
Meet with representatives from all stakeholder groups (Senior Management, Middle Management, Unions, HR, WH&S, any strategic information management groups and so on)			
Set up Survey Steering Group		9 months prior	
Set up Specialist Reference Group to develop additional questions			
Briefing Note (BN) to DG re: Progress Report re Review Panel		5 months prior	
Develop strategy for gaining Senior Management Support		5 months prior	
Final Draft of Survey questions		3 months prior	
Consider development of video or multi-media awareness campaign			
Decide on final dates for survey and get sign-off by delegate		8 months prior	
Liaise with provider on timing etc		7 months prior	
Inform Senior Managers, HR advisors & staff of timing		7 months prior	
Communication Strategy			
(See free resources on www.surveyyourstaff.com)			
Develop Communication Strategy		7-5 months prior	
Develop ways to gain Senior Management support		7-5 months prior	
Information session with Union Reps		5-3 months prior	
Message from Unions to staff re: Survey		3 months prior	
Draft DG's Message, Invitation to participate, Reminder emails			
Distribute e-bulletins to all staff re Survey			

Distribute instructions to complete survey (email)			
SURVEY Intranet site			
Promotional posters, payslip brochures etc			
Final email to all staff inviting survey completion			
Brief for DG, DDG, EDs		7 months prior	
Keep key stakeholders up-to-date (eg. HR Advisors, Senior Execs etc)		monthly	
Logistics			
Identify where paper surveys needed (email to HR Network)		6 months prior	
Solve IT & Technical issues for access to on-line survey		6 months prior	
Use HRIS (SAP, Aurion etc)for batch structuring		6 months prior	
Consult HR Advisors and business to check appropriateness of batch structuring		6 months prior	
Distribute Passwords to each work unit (if needed)		6 months prior	
Distribute paper-based surveys to HR Advisors (electronically)		5 months prior	
Develop strategy to target areas with low response rates			
Implementation			
Publish bulletins to all staff on Message Centre		6 weeks prior	Weekly
Publish intranet site		6 weeks prior	
DG's Message		1 week prior	
Send out invitational email		1 st day	
Send out reminder emails		3 rd , 5 th & 7 th day	
Get response rate reports during survey			
Send out BN to TLT re: response rates		3 rd , 5 th & 7 th day	
Implement strategy to target areas with low response rates			
Reporting			
Preliminary report	Survey administrator	4-6 weeks	
Analysis	Survey administrator	4-6 weeks	
Overall strategic findings	Survey administrator	4-6 weeks	
Distribute printable toolkit for staff (see www.SURVEYassist.com)		6 weeks	
Keep stakeholders up-to-date (eg. HR Advisors, Senior Exec etc)		monthly	
Develop Brief for DG and EDs		4 weeks	
Distribute Feedback for all staff		6 weeks	
Distribute Message from DG for all staff		6 weeks	
Updated Survey Intranet site - uploaded		6 weeks	
Presentation Phase (See low-cost resources on www.surveyourstaff.com)			
Initial briefing to DG and DDGs		4-6 weeks	
Final briefing (Divisional results) to DG and DDGs		4-6 weeks	
Schedule presentations		6 weeks	

Action Planning and Progress Reporting (See free resources on www.surveyourstaff.com)			
Make recommendations for whole of department strategies to improve Organisational Climate	Project Manager	3-4 months	
Divisional/Regional/local strategies decided	locally	3-4 months	
Coordinate recordkeeping of local strategies		6 months	
Progress Reporting on actions - 6 monthly		6 & 12 months	
Further Analysis (See free 'how-to-guide' on www.surveyourstaff.com)			
Culture summary			
Integrate SURVEY data with HRIS data such as Single-Day Sick Leave (Regression Analysis)			
Outlier report			
Analysis of drivers of Innovation, Commitment, Satisfaction etc			
Impact analysis of Flexible Work Initiative, programs etc			
Retention Analysis			