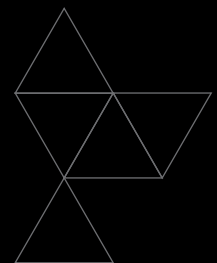
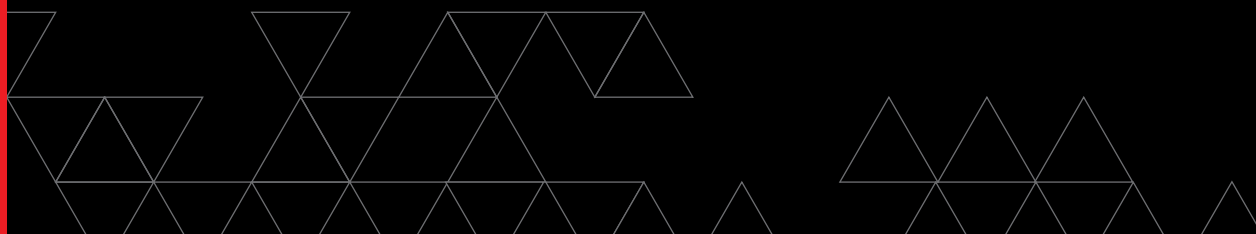


# **WORKFORCE ENGAGEMENT SURVEY TOOL**

**How to set up and  
run the Workforce  
Engagement Survey**



 **STEP CHANGE  
IN SAFETY**



# WORKFORCE ENGAGEMENT SURVEY TOOL



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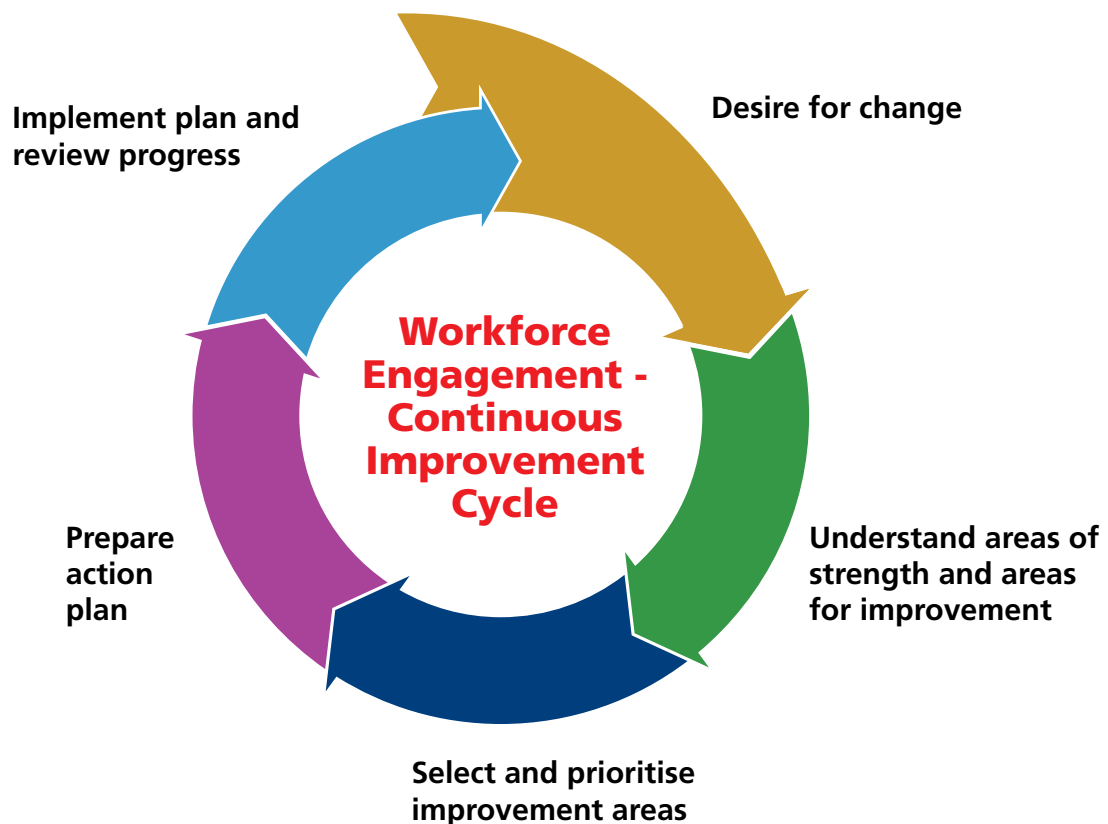
## Section 1. How to run a workforce engagement survey

### Why run a workforce engagement survey?

To improve Workforce Engagement at any worksite, the areas that are working well and those with opportunities for improvement need to be identified. The Workforce Engagement survey does this by helping everyone on a worksite understand:

- How engaged in safety people are,
- The strengths and areas for improvement in Workforce Engagement, and
- The impact of improvements that have been made (by repeating the survey at future dates to measure any changes).

The survey forms the second part of the Workforce Engagement continuous improvement cycle.



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## Planning for the survey

In order to plan for the survey, the following actions must be taken;

1. Ensure the senior leadership team shares an understanding of what Workforce Engagement is, the purpose of the Workforce Engagement survey and supports the running of a survey.

Information can be found in Workforce Engagement: A practical guide from Step Change in Safety.

2. Appoint a company champion and worksite administrators for the Workforce Engagement Survey (WES). (See description of roles in the Appendix)
3. Decide which groups will be included

As a general rule of thumb, it is recommended to involve as many groups as possible on a worksite in the whole improvement process, not just the survey.

The total number of people who could respond to the survey needs to be determined; this number is required to set up the survey.

4. Decide on the timing of the survey

There are two questions to consider regarding the timing of the survey – when to run it and how long to keep it open for.

- **When:** Consideration should be given to any planned shutdowns or maintenance that might be affecting the worksite. These activities generally should not stop a survey going ahead, but they may mean that the survey needs to remain open for a longer period of time to ensure all groups on the worksite get the opportunity to participate.
  - **For how long:** For most worksites, the survey should be kept open for at least two months, but no longer than three. However, the actual duration of the survey process will depend on the rotation patterns of the groups involved, and any of the events discussed above.
5. Log in to the WEST portal to register and initiate your survey: <https://west.atlasknowledge.com/>

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## Preparing for the launch

6. Understand how to communicate about the survey.

Download the introduction PowerPoint and ensure everyone at the worksite sees this presentation.

There are several key messages to communicate about the survey. These include:

- It is an industry survey, 100% designed to improve safety in the offshore energies industries
- Responses are completely confidential
- The survey is designed to start a dialogue by understanding everyone's views on the worksite
- Workforce Engagement is an ongoing focus – not just a tick box exercise that will get filed away

7. Make efforts to engage key groups early in the survey process

Many worksites are able to run better quality survey processes when they engage key groups such as Safety Representatives early in the survey process. This typically involves holding a specific meeting with the key group to discuss the purpose of the survey and how the process works.

Most importantly, the key groups should be asked how they think the feedback and improvement plan development processes could best be undertaken at the worksite.

8. Communicate about the survey

Communicate about the survey using as many communication channels as possible. Talk about it during planned and unplanned meetings, one-on-one discussions, highlight it on the company intranet, and using the available poster.

## Running the survey

9. Obtain the unique survey internet address from the WES. Consider creating a QR code and adding this to the poster, giving people more opportunity to access the survey.

10. People can take part in the following ways:

1. Email the unique URL to everyone and ask them to complete it in their own time
2. If mobile devices are available / allowed answering the survey can be done during a meeting with time set aside. This generally results in more surveys completed.
3. The survey may be distributed in hard copy but this requires resource for data input and raises concerns about anonymity.

Due to the anonymous nature of the survey, there is no way of knowing who has completed a survey and who has not.

11. When the survey has closed, thank everyone for participating and commit to a time for feeding back the results. Announce when the results will be fed back. Commit to a date to feedback the survey results and develop an improvement plan. Make sure this commitment is met.

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## Downloading, feeding back the results and creating an improvement plan

12. Review the survey results and discuss them with key groups.

It can be helpful to review and discuss the survey results with key groups (such as senior leaders and safety reps) prior to feeding back the results to the whole workforce.

The purpose of this review and discussion is to familiarise these key groups with the results to ensure they can help others in the workforce understand them.

Report section	Approach	Description	Purpose
<b>Maturity level</b>	Maturity	A summary report that takes the results for each dimension and compares the average of the questions in each dimension to the framework scoring model for each dimension.	To provide a simple summary of the overall conditions for workforce engagement at the worksite which is consistent with existing approaches to understanding culture.
<b>Dimension summary</b>	Percentage	A summary report that shows the percentage of favourable, neutral and unfavourable results. Deviation from the industry average is shown.	To quantify the overall conditions for workforce engagement and show how similar the results are to industry benchmarks.
<b>'Top Five - Bottom Five' section</b>	Percentage	A summary report that shows the percentage of favourable, neutral and unfavourable results for the top / bottom five scoring questions in comparison to the industry average. Deviation from the industry average is shown.	To show which the biggest differences between the worksite and the industry average – these results really 'characterise' conditions for workforce engagement at this time.
<b>Detailed dimension results (six parts)</b>	Percentage	A detailed report that shows the percentage of favourable, neutral, and unfavourable results for all questions in each dimension. Deviation from the industry average is shown.	To provide detailed information about the questions in each dimension to see if there is consistency within dimensions.

Purpose of each section of the report

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## 13. Feedback the survey results to the workforce.

Organise briefing sessions to feed the results back to the workforce. It can be helpful to organise large, specific briefing sessions that are attended by senior managers / site leaders in which the overall results are presented. Enough briefing sessions should be planned to ensure all groups who participated in the survey get the chance to attend.

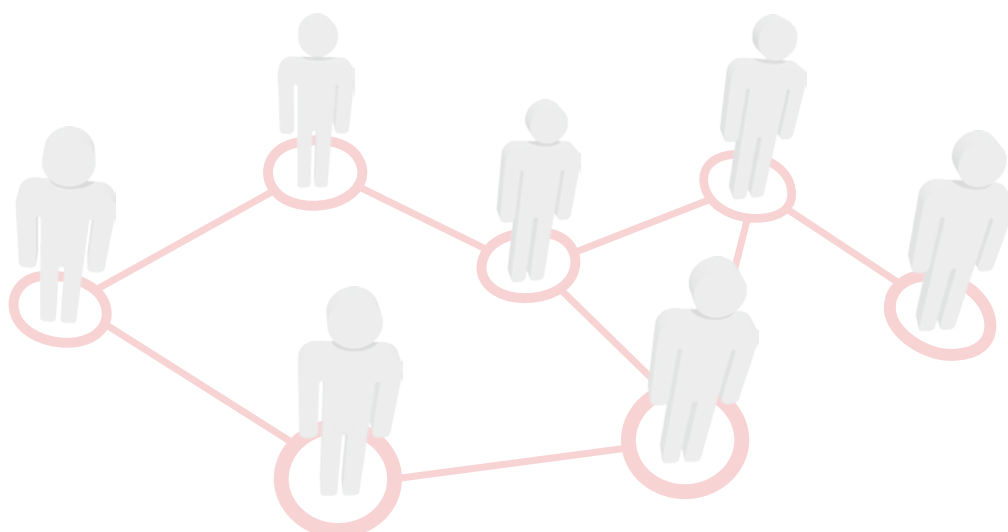
It is important that the purpose of the Workforce Engagement survey is not lost amidst the many figures and statistics available within the survey results reports.

After the results have been presented, the workforce should be asked if the results 'feel right'. This sense-checking step is important to ensure that the survey process is seen to be open, honest and trustworthy.

## 14. Creating an improvement plan.

Document 'Positive Engagement Good Practice' will help form ideas of how workforce engagement can be improved for each dimension.

Host workshops and involve as many people as possible when creating the improvement plan.



# WORKFORCE ENGAGEMENT SURVEY TOOL

## Section 2. Using the Workforce Engagement Survey Portal

### Set up your organisation in the portal


Each Step Change in Safety (SCiS) member company is listed on the Workforce Engagement Survey (WES) portal and a 'Company Champion' has been allocated to every member company. By default, this is set to the SCiS Focal Point but can be changed.

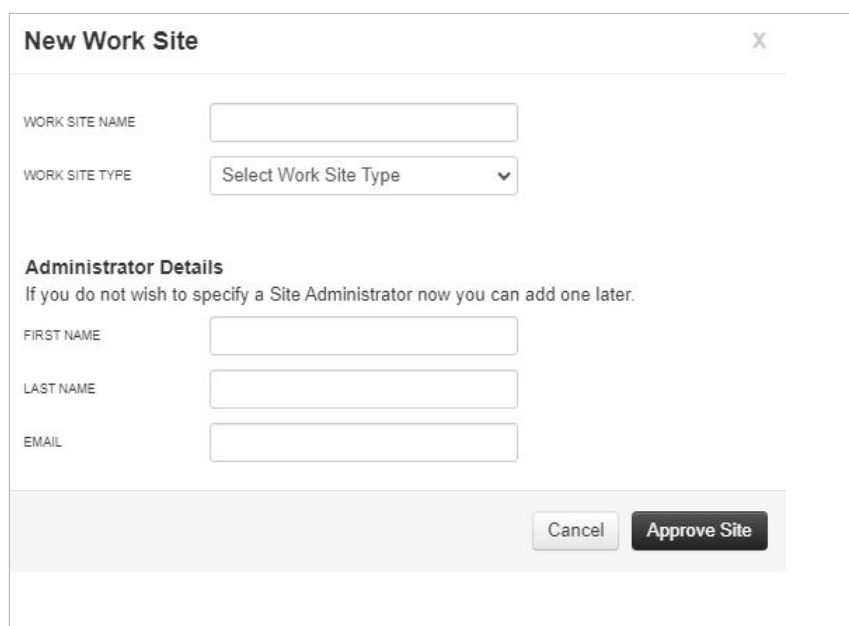
Once you have successfully logged in (<https://west.atlasknowledge.com/>) with the log-in details you will receive by e-mail from the system, it is recommended that you change your password to something more personal, which can be done by clicking on your name in the menu bar and select 'Profile'. This will allow you to change your password and other contact details.

### Add worksites

After log-in on the portal homepage, click on your 'Company Name' in the menu bar.

If you have any survey requests from staff or contractors from any of your work sites, these will appear at the top of the page. More details on how this process works can be found in the section 'Dealing with inbound Work Site Survey Requests' on page 13.

To set-up a new work site directly within the portal, click on the  button in the work sites header and enter the work site details:



**New Work Site** X

WORK SITE NAME

WORK SITE TYPE

**Administrator Details**  
If you do not wish to specify a Site Administrator now you can add one later.

FIRST NAME

LAST NAME

EMAIL

Enter the name of the work site, select the work site type and provide the name and e-mail address of your preferred site administrator. Note you can add further administrators later in the process.

Additional work sites can be registered by repeating the above process.

# WORKFORCE ENGAGEMENT SURVEY TOOL

## Create survey

To create a survey, click on the company name in the menu and then on the relevant work site name.

Work Sites							Custom Report	+ New Work Site
WORK SITE NAME	ADMINISTRATOR	MATURITY	STATUS	START DATE	END DATE	RESPONSES		
Example Worksite	Jane Doe, Jack Doe, John Doe	N/A	●					

On the following screen, specify the survey parameters as follows:

### Create Survey

To create a survey, please complete the fields below. Please note the Survey window cannot be shorter than 14 days or longer than 3 months.

Survey Start Date  Survey Size

Survey End Date  Survey Name

PDF and printed copies of the survey, old and new, for this work site share the same ID of : **uws4h19n**

Note the survey start date must be a future date and the survey end date should be no later than 3 months from the start date.

The survey size is the expected number of responses on the survey at this site, and the survey name is a descriptive name you give to this first survey (any subsequent surveys will have their own name).

In the Employers / Contractors section, add the names of the main contractors that are represented on this worksite. Most contractor companies will be available from the short list, but if they are not, you can enter the name in the input field and add them as a contractor. Contractors can be removed by clicking on them. This selection is important because it will allow your work site contractors to associate themselves with their employing company, hence making it possible for future report filtering.

### Employers / Contractors



Please populate this section with the Employing companies of your workers for use in the survey

\* please try not to duplicate companies with minor name differences

# WORKFORCE ENGAGEMENT SURVEY TOOL

Finally, you can add further Administrators and remove existing Administrators in the Administrator section on this page:

### Administrators

John Doe	john.doe@example.com	
Jane Doe	jane.doe@example.com	

**Add Administrator**




First Name  Last Name  Email

When you press the 'Create Survey' button, the survey will be set-up and initiated.

## Managing a live survey

Once a survey has been initiated, you can view its progress by clicking on the work site name, this will reveal the following survey dashboard:


### Workforce Engagement Survey - Test Survey


Overview Survey URL <https://west.atlasknowledge.com/survey/uws4h19n>    


[Close Survey](#)

Start date	<input type="text" value="04/01/2024"/>	Survey Size	<input type="text" value="30"/>
End date	<input type="text" value="04/03/2024"/>	Responses	<b>0 online, 0 paper</b>
Days remaining	<b>+59</b>	Response Rate	<b>0%</b>

The preferred method for participating in the survey is to complete the online survey form. Only in exceptional circumstances should a paper survey be used. Paper survey data require to be inputted manually by the company undertaking the survey and may jeopardise the anonymity of those taking part.

To view the online survey, click on the  button.

To view the PDF (printable) version of the survey, click on the  button, which should also be used to print paper copies of this site specific survey.

To e-mail the details of this unique survey to anyone (even yourself!), click on the  button.

# WORKFORCE ENGAGEMENT SURVEY TOOL

## Close a survey

To close a survey, click on the 'Close Survey' menu option.

NOTE:

- when closing a survey, it is essential to understand and acknowledge that the online survey URL will be inaccessible with immediate effect
- any survey with less than 10 returns is not valid and will be deleted from the system.

### Workforce Engagement Survey - Test Survey

Overview

Close Survey

On closing this survey

- The online survey URL will be inaccessible with immediate effect.
- This survey and all responses will be discarded and a report will not be generated because at least 10 responses are required to ensure anonymity and confidentiality.

I confirm I understand the above

Close Survey Now

NOTE: You must tick the 'I Confirm I understand the above' check box before you can close the survey.

## View survey report

Survey reports can only be viewed once the survey has been closed.

To view the survey report, select Company Overview from the Company Name in the Menu.

Work Sites							Custom Report	+ New Work Site
WORK SITE NAME	ADMINISTRATOR	MATURITY	STATUS	START DATE	END DATE	RESPONSES		
Example Worksite	John Doe, Jane Doe	■■■■■	●	04/01/2024	04/01/2024	10 / 30		

# WORKFORCE ENGAGEMENT SURVEY TOOL

Click on the work site name to reveal a screen that will contain a section titled 'Historic Surveys'. NOTE: If there are no historic surveys, then this section will not appear.

Historic Surveys						
SURVEY NAME	START DATE	CLOSE DATE	SURVEY SIZE	RESPONSE COUNT		
Test Survey	04/01/2024	04/01/2024	30	10	<a href="#">View Report</a>	<a href="#">View FreeText</a>

You can now click on the 'View Report' link to open the online dynamic version of the survey report. The online report consists of a number of sections:

- Maturity Report
- Dimension Report
- External Benchmark Report (Detailed Question Results)
- Detailed Reports for each of the individual dimensions
  - Visibility
  - Communication
  - Involvement
  - Support
  - Participation
  - Challenge

**Info**

**Workforce Engagement Survey - Test Survey**  
**Example Company - Example Worksite**

Champions :

Administrators : John Doe, Jane Doe

Started on 04/01/24, Closed on 04/01/24 (0 days)

Expected Survey Size : 30

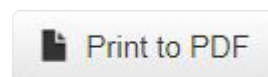
Response Rate : 33% (10 online, 0 paper, 10 total)

**Maturity Report**

**Dimension Report**

Each of the report sections can be viewed by clicking on the section title to reveal the results. To hide the report section, click on the section title again.

The report can be printed or exported as an XLSX file.



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## Custom reports

Reports from a number of surveys can be combined, e.g. a number of surveys from the same work site undertaken at different times, or a number of work sites surveyed at the same time.

Click on Custom Report button and select Latest or All to combine your chosen surveys then click on Run Report.

Work Sites							Custom Report	+ New Work Site
WORK SITE NAME	ADMINISTRATOR	MATURITY	STATUS	START DATE	END DATE	RESPONSES		
Example Worksite	Jane Doe, Jack Doe, John Doe	N/A	●					

## Dealing with inbound work site survey requests

It is possible and very likely that you, as the Workforce Champion in your company, will receive requests for a survey to be conducted on one of your work sites. These requests could come from anyone working on one of your assets.

This request will trigger a system e-mail alert to your e-mail address, informing you that a named individual has requested the work site to be registered for the survey.

The next step is for you to log in to the Workforce Engagement Portal and select your company name. You will find the most recent request listed at the top of the page:

Work Sites							Custom Report	+ New Work Site
WORK SITE NAME	ADMINISTRATOR	MATURITY	STATUS	START DATE	END DATE	RESPONSES		
Requesting User has requested to be the Site Administrator for Another Worksite								
							Accept / Reject	

# WORKFORCE ENGAGEMENT SURVEY TOOL

This request will only be listed if the Work Site has not yet been set-up in the system. Clicking the 'Accept/Reject' button will bring up the following dialog:

### Work Site Request

WORK SITE NAME  (edit if required)

WORK SITE TYPE

**Administrator Requests** ACCEPT REJECT

Requesting User

This request will only be listed if the Work Site has not yet been set-up in the system. Clicking the 'Accept/Reject' button will bring up the following dialog:

### Work Site Request

WORK SITE NAME  (edit if required)

WORK SITE TYPE

**Administrator Requests** ACCEPT REJECT

Requesting User

Reason :

**Administrator Details**  
If you do not wish to specify a Site Administrator now you can add one later.

FIRST NAME

LAST NAME

EMAIL

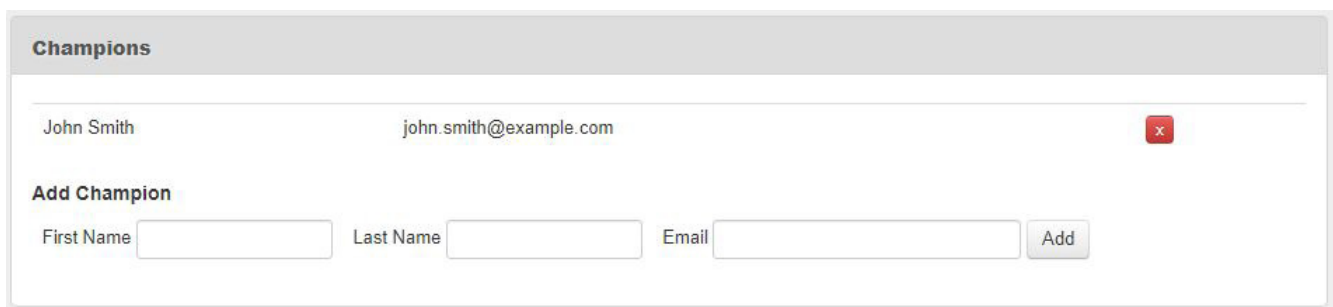
You can then enter the name and e-mail address of the preferred Administrator, allowing you full control to ensure the most appropriate person is appointed.

Finally, in order to approve this Work Site for the Workforce Engagement Survey, click on the Approve Site button. The Administrator will receive an acknowledgement e-mail, which will also provide a unique log-in.


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## Adding company champions

If you wish to include other individuals in your company as Company Champions, or if you need to pass your role over to someone else, then click on your company name in the top menu and scroll to the 'Champions' section:



The screenshot shows a web interface titled "Champions". At the top, there is a header "Champions". Below it, there is a table with one row containing "John Smith" and "john.smith@example.com". To the right of the email address is a red square button with a white "x". Below the table is a section titled "Add Champion". This section contains three input fields: "First Name", "Last Name", and "Email", followed by an "Add" button.

Here you can add the name and e-mail address of another Champion. If you need to delete any Champions, then click on the associated  button next to the Champion.

## Support contact details

For technical support on the Workforce Engagement Survey Tool, please contact the Workforce Engagement Technical Support Team on +44 (0)1224 651340 or via e-mail on support@mintra.com

## Appendix

### Role of a Company Champion

Each company must have at least one Champion but can have more than one. The default setting is the Step Change in Safety Focal Point but this can be changed. The listed Champion must do this.

The Champion can:

- Add new company Champions
- Add Worksite Administrators
- Set up new surveys and close them
- See all details of all surveys being undertaken by their company, including downloading results

### Role of a Company Administrator

Each survey must have at least one Administrator. This is set up by the company Champion. It is usual for the Administrator to organise setting up each survey, distribute links to participants and answer questions from the participants.

The Administrator can:

- Add Worksite Administrators
- Set up new surveys and close them
- See all details of all surveys over which they are administrators, including downloading results



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