



# STAFF WELLBEING SURVEY CHECKLIST

HOW TO SUCCESSFULLY RUN YOUR SURVEY

---



If you want to improve staff wellbeing and create an even better climate, start by understanding where you are now. Like using a Sat Nav, if you make plans and have a destination in mind, you must know where you are starting from.

Running a staff wellbeing survey is one way of measuring your current position, seeking anonymous feedback that will help you create your baseline, from which to track progress. This will also help you meet commitment 11 in the new DfE Education Staff Wellbeing Charter.

*Hold ourselves accountable, including by measuring staff wellbeing. We will measure the wellbeing of staff using recognised tools and metrics and be transparent about results. We will monitor trends over time, and act in response to changes.*

### **DfE Education Staff Wellbeing Charter Commitment 11**

Starting on the next page, you will find a checklist with the steps you should follow to plan and run a staff wellbeing survey. Each step is then explained in more detail, to help you to do this as effectively as possible and quickly use the findings to improve practice for staff and students. Read through all the steps, as some are linked and they should be planned in parallel.

The survey is just one part of measuring staff wellbeing and is just the start. What happens afterwards is most important, as this is where good conversations and shared solutions are created, and plans are developed and implemented.

Following the process set out will give you the best chance of systematically improving the wellbeing of your staff and the outcomes for your students.

If you have any questions, please get in touch.



**Mark Solomons, Welbee**



# Staff Wellbeing Survey Checklist

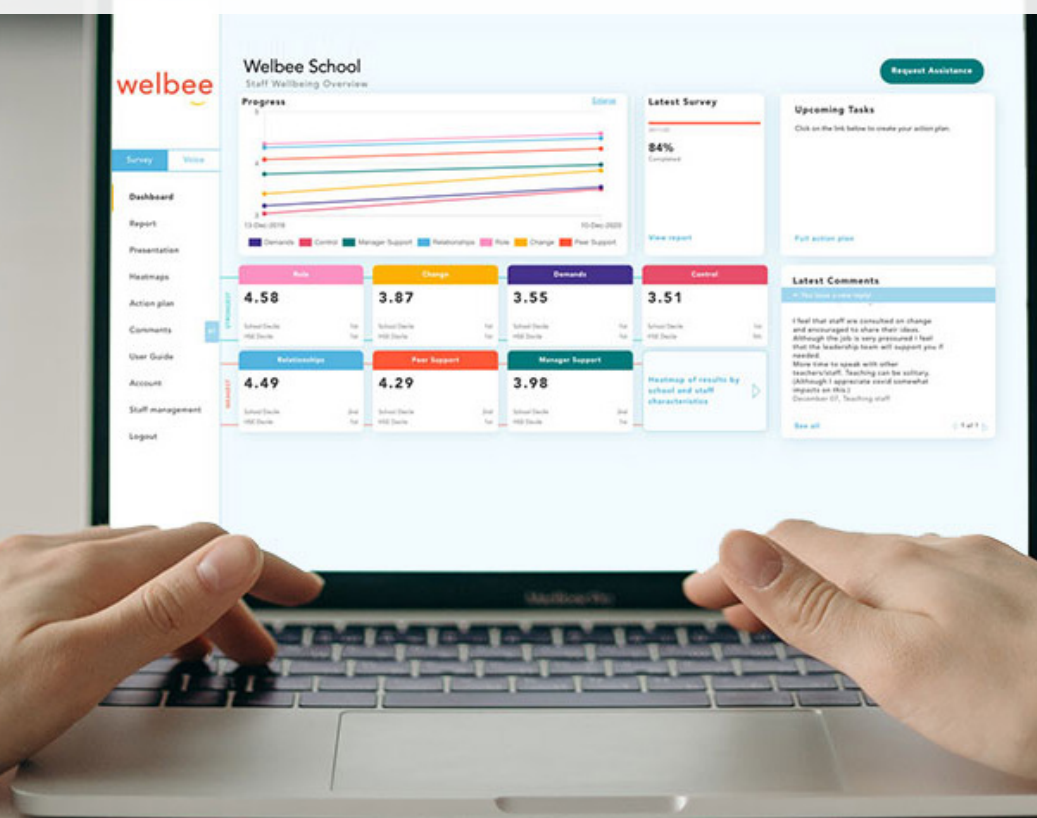
## Pre-Survey

- Set survey launch and close dates
- Choose the survey/questions you will be using
- Decide how to deliver the survey to your staff
- Decide what you will do to ensure a high participation rate
- Set a time(s) to engage with and brief staff
- Decide how results will be collated and analysed
- Book time in to review the results as a senior team
- Plan to involve your wellbeing team, council or committee  
(if you have one)
- Plan when and how to feedback results to all staff
- Plan how you will respond to specific staff comments
- Run your survey

## Post-Survey

- Finalise goals and actions, after engaging with all staff
- Add actions to the school development plan
- Repeat the survey

## #1 What dates will you launch and close your survey?



This step is simply the starting point and many people running surveys do not think about the end to end process that is needed. The most important part is not the survey, but what happens afterwards. So choosing your date for launch allows you to work backwards to your current time and forwards beyond the survey to ensure you have got everything in the checklist covered and in place.

One question I am regularly asked is “When is a good time to run the survey?” The problem is that there is not usually a good time, as there is always something else going on. Quiet times simply do not happen in schools and colleges, as you know.

Instead, I ask them to focus on better times and when not to do it. Don't run your survey in those weeks when there is much more than the simple busy week. Avoid weeks with parent consultations, report writing, or when there are important deadlines.

Beyond this, choose what works best for you. It doesn't really matter whether you launch in autumn, spring or summer term. Some schools like to fit in with their SDP process for updating plans, others like to start the year with it.

If you have not run a survey, or only run one which has not created a school baseline or focussed actions, I would

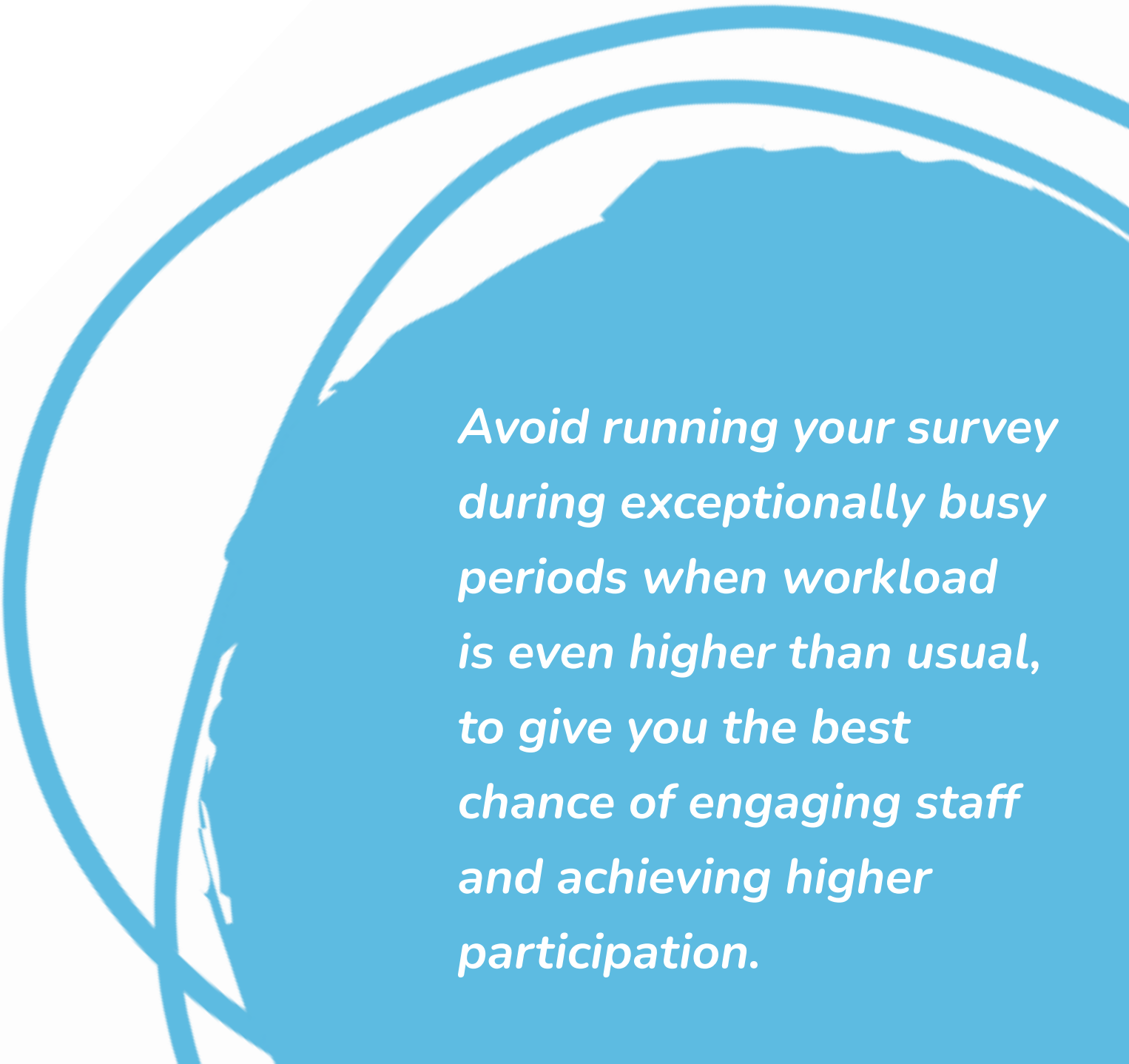
suggest starting as soon as you are able to put your plans together. And in the next best time!

Other things for you to consider are; who will manage the survey; keep on top of participation; ensure it launches and closes on time; and make sure the other elements in the checklist are delivered?

The CEO, where there is one, Principal, Headteacher and Senior leaders will

all need to own the results (and brief staff), and it will be useful to ensure there is someone appointed to manage the process.

If you have a wellbeing team or committee, you will want their involvement, however this should not remove the need for senior leader support or take away from accountability for managing and delivering the survey.



*Avoid running your survey during exceptionally busy periods when workload is even higher than usual, to give you the best chance of engaging staff and achieving higher participation.*



## #2 What survey or questions will you use?

Ideally, you should use a survey or questions that have an evidence base, are independently evaluated, for example for their psychometric qualities, and look at the key areas for workplace wellbeing. These are the areas you have the greatest impact on and are able to address to create a culture and environment where your staff (and students) want to work and can do their best work.

We recommend the Health and Safety Executive Indicator Tool. It focuses on the six primary stressors identified in the Management Standards approach and the questions are based on the best available evidence linking work design to health outcomes. It was developed to provide a broad indication of how well staff rate school performance in managing the risks associated with workplace wellbeing and work related stress. It is also freely available.

Use the [What Works Wellbeing question bank](#) if you want other freely available questions. Otherwise, use questions where you are clear on what they are measuring. Some surveys simply state they have been developed by psychologists, so look for the evidence behind why questions are asked.

If you decide to create your own questions, be aware of these possible pitfalls:

- Avoid leading questions that guide people towards a particular answer, by words they use or the way they are asked.
- Accept you may get answers that are difficult to interpret or are unclear in outcomes, as opposed to those developed through an evidence based approach.
- You are less likely to be able to benchmark your scores against other schools. When using a Likert scale, all scores are not equal. Yet we tend to think of 3 as OK, 4 as good, and less than 3 as needing attention. However, it is probable that in some areas a score of 4 will leave you with significant headroom for growth, while a score in the low 3s in another area could be in the top 10% of schools and waste time and effort if you focus on it.

### #3 How will you deliver the survey to your staff?



You have two main choices:

- 1. Use paper and pen** – some schools still do this. It may be easier for those that are less technologically skilled and has one major disadvantage relating to anonymity (see the next section on achieving a high participation rate).
- 2. Deliver it online.** This is what most schools do now and the two main tools I see being used are Survey

Monkey and Google forms. Both of these can be used for free, though to get a good level of filtering may need a paid account for Survey Monkey.

Whatever method you use, you will need to analyse the results and put them into a useful format to ensure you can use the findings and quickly move to action.



## #4 What will you do to ensure a high participation rate?



Obtaining a high response rate is important to ensure your results correctly reflect the situation in your school, college or MAT.

As a crude rule of thumb, for a survey of this type, a response rate of over 50% could be considered adequate; over 60% desirable; over 70% good and more than 80% very good. When we work with schools, we always aim to achieve a minimum of 80%, though it is not always possible and particularly in the largest schools.

It is important to get the balance right between encouraging participation and 'forcing' people to take part, as the latter will probably mean responses are less likely to be as open as you would want.

With a response rate of less than 50%, the data should be considered as indicative only, and treated with extreme caution.

There are several things you can do to encourage a good response rate before you start your survey. Not least is that staff should feel it is important, that their views matter and that they will be listened to and acted on. Below are some steps you can take.

- Publicise the survey, engage with staff and union representatives and include supportive comments from the CEO, Principal, Headteacher and other senior leaders.
- Ensure that all staff understand:
  - The purpose of the survey – why are you doing it?



- Why they should take part and what's in it for them?
- How and when they will be asked to take the survey.
- How and when they will get feedback on results (at least at a summary level).
- How you intend to address findings.
- Ensure there really is anonymity of responses and staff believe this. Using a paper system is likely to compromise this as staff will correctly think that their responses maybe known or identifiable. While you may intend to maintain anonymity, this will be less obvious to staff. Using online methods (or a third party) is likely to reassure many staff, but not all. The greater their belief that their responses are anonymous and they will not be identified, the greater the likely number of staff who will take part and the greater likelihood that responses will be frank and honest.

You should insert a formal statement of anonymity at the beginning of the survey, as well as communicating this in writing and verbally ahead of running it. You also need to make sure that the behaviour of all leaders is congruent with this message. It is always possible that a staff member may identify themselves through

comments, and if this does take place you must maintain confidentiality and not pursue any individual action. Failure to practise this, as well as demonstrating a lack of integrity, will have repercussions for future survey participation, engagement and the degree to which staff will trust you.

- Give people enough time to complete the survey. Ideally, make this no more than ten to fifteen minutes, though it will depend on the survey and questions chosen, how many there are and whether the survey automatically moves to the next question as the previous one is answered.
- Ensure line managers understand that the process is important and that they encourage their staff to take time to complete the survey.
- Allow staff to complete the survey in work time, where possible, rather than expecting them to complete it in their own time. We know that this provides much better response rates and sends the right message about wellbeing.
- Continue to publicise the survey throughout the process.
- Provide contact for questions or support.

## #5 How and when will you engage with and brief staff?

Before launching your survey, use the information in number #4 above, and make sure all staff are covered. It is difficult to communicate too much, as long as it is done well, and the right amount needed is usually more than you think

You might start with a briefing in a staff meeting, follow this up in writing, add it to notice boards and weekly updates and create a countdown. Reiterate anonymity, that the survey

is important for you and how you will provide feedback. Try and engender a feeling of personal responsibility in staff taking up the opportunity to provide feedback. Wellbeing is subjective and staff members should not rely on the feedback of others.

Brief all leaders about the key role they have, to encourage the participation of their team members before and during the survey.

*Try and engender a feeling of personal responsibility in taking up the opportunity to provide feedback.*

## #6 How will results be collated and analysed?



Running your own survey will mean you need someone or a group to pull together and analyse results. Whether or not you are able to put them into nice tables and charts, you will still need to interpret what these mean.

You may have some staff who are good with data, though you will also need the involvement of those who lead practice across the school. This is likely to be one of the biggest and most time consuming jobs, if you want

to use the feedback you have received for action.

Not doing this well, the lack of comparative data with other schools or not understanding what good and less good looks like, are often the reasons why surveys lead to little action, improvement or sustained changes. There is good intent and unactionable results. So plan how you will do this prior to launch.

## #7 Book time in to review the results as a senior team

Don't wait until the survey is closed to work out how you will review results and book the time in to do it before launch. This will mean you are more likely to share results with staff in a timely manner and take action.

Where it needs people to meet, ensure this is already planned into the diary and stick to the agreed timelines. It will demonstrate to staff how important you are taking their feedback and that you listen.

When you get to reviewing results, you will want to identify areas to celebrate, for quick wins, for longer term action and where you might need further discussion or investigation.

Involve staff in solutions and make sure this isn't simply senior leaders left to 'solve problems'.

It is also where you should look at wider school data and the trends you are seeing, which is something you

are probably doing regularly, and will have considered prior to the survey. These are likely to include such things as:

- Absence statistics, the reasons for absence, the impact of cover (on wellbeing and financially) and feedback from return to work and welfare interviews.
- Attrition or retention statistics (and feedback from effective exit interviews).
- Use of Employee Assistance Schemes (if you have one) and any other support provided, such as counselling – this will usually be headline and anonymous information.
- Grievances, behaviour issues (students) and relationships.
- Changes in school and student outcomes.

*Plan when you will  
review your survey results  
before you even begin  
gathering data.*



## #8 Plan to involve your wellbeing team, council or committee (if you have one)

If you have a wellbeing group (whatever you call them), what will their role be? They will be important as supporters, communicators and champions and used well will make a significant difference.

Use them effectively and make sure members are the right ones, and they

will support you in providing two way feedback and enabling change. If it is merely a talking (or even moaning) shop then look at how to change it.

What a wellbeing group cannot do, is own the response to feedback. This has to come from the senior team.



## #9 Plan when and how to feedback results to all staff

You should ideally book in when you will feedback to staff before you launch. If you wait until further down the line, it is more likely to get pushed back, or worse still, missed.

Start with a quick or a brief summary of headlines first, and as soon after closing as you can. This can be in verbal or in written form and simply needs to thank staff for taking part, remind them of the next part of the process (when they will get more details) and possibly highlighting one or two headline findings (including celebrations).

Providing more details is best done face to face, where possible, and in a way that engages staff in action. This should not be about the senior team delivering things for other staff. The senior team are also part of the staff and their wellbeing is also important.

To give focus, you might provide a summary of results, highlight areas to celebrate and no more than two areas for focus (for now you can say these were the most important findings). You can add more once these have been tackled, if there are any.

Ask “What are we going to do to improve this?” Whether using a staff meeting or inset day, give some time

for staff to share their solutions, so that agreed actions become shared as a school.

Failing to share results, whatever the feedback, means staff are less likely to participate in future surveys or engage with actions. It will also destroy trust.

Failing to ask staff to help create actions and making these shared, means all the workload and accountability falls on senior leaders, reducing their wellbeing and the likelihood of improvements and change.

## #10 How will you respond to specific staff comments?



Within your survey you should ask a very small number of open comment questions. If you ask too many, you are unlikely to get sufficient responses.

Two is a good number, within a larger survey of multiple choice questions.

You might ask a general question about what is going well and what can be done better and then a more specific one.

This will give you some very useful comments to underpin scores and likely actions. You are looking for trends and you can summarise these and share with staff as appropriate. What you can't do, when doing your

own survey, is reply to individual comments, if the survey is anonymous.

Finally, remember to not take anything personally. Sometimes difficult, and even in the best schools it is impossible to please everyone and you shouldn't try!

While you will not know exactly what you will be responding to, be aware that you will need to create time to review comments and share a summary of the trends identified.

In responding, think about what is fair and appropriate action and the effective leadership behaviours you want to see moving forward.



## #11 Run your survey

Launch your survey and continue to promote participation. Keep the survey open for a week to two weeks, unless

you have been able to give staff the chance to take it together, for example in a staff meeting or inset day.

## #12 Finalise goals and actions

Once you have been through the above process, you need to set out clear actions.

The step before this is one missed by many school leaders – setting goals.

As a result of taking action, what is it you want to achieve and why? This is important for staff buy-in as they will want to understand the ‘why’ and

be bought in emotionally, as well as practically.

Then, be clear on the measurable outcomes - what does success look like? Finally, what needs to be done to achieve these? It is in implementation where many plans fail! Particularly in not continuing to focus and embed actions before moving on to something else.

## #13 Add actions to the school development plan

Add actions to the SDP, monitor in the usual way (as long as this is effective) and build what you are doing into business as usual. Staff wellbeing should simply be a part of what happens every day.

Track progress, amend as needed, and use school data, observations, staff discussions and all the items listed in #7 above.

## #14 Repeat the survey

Ideally, use the same evidence backed questions again so you can see exactly what has or hasn't changed. Scores may go down as well as up, and depending on what may be happening at the school and in the outside education and wider environment, this is both possible and likely.

Some leaders like to swap questions

in light of what is happening in and outside school. While you might add one or two, I would recommend avoiding adding more, so you can track effectively. You can interpret the results taking into account the environment.

If you need feedback on specific things then a short additional survey with



one or two open questions might be a better way of doing this.

If you manage this process well over

time and keep a focus on implementing shared actions as a staff body, your results will improve and deliver the many evidence proven benefits.

## Running your own survey

Can you run your own survey? The simple answer is yes and I hope the steps we have set out will help you to do this as effectively as you can.

Should you run your own survey? That requires more thought. If it is your only option then go ahead.

If you have an option to consider alternatives, then is it the best approach to use stretched and skilled

resource from your own school to undertake something where they are unlikely to have all the knowledge and experience? What are the opportunity costs and what are the costs of staff time in setting up, managing and analysing results?

Below, you will find a table of pros and cons of running your own survey versus letting a third party, like us, take care of it for you.

### DIY vs. Third-Party

Area	DIY	Third Party
Survey and questions	Research and find the evidence behind the survey or questions	Likely to be an existing and evidence based survey already available and ready to use.
Survey set up	Choose the method of delivery and create the survey.	Done for you.
Invitations	Email out to everyone or post in pigeonhole?	Likely to be some set up needed to add staff records to allow invitations to be sent.
Reminders	Will need to be done verbally.	Verbally by the school. It is likely reminder invitations can be sent automatically to those who have not yet taken the survey.
Promoting Anonymity	Online delivery is important to promote anonymity.	Most likely to believe it is anonymous if not delivered by the school, college or MAT.
Briefing staff	You will need to do this effectively, whatever method you choose.	

Area	DIY	Third Party
Collating & analysing results	This will need to be done in school and is likely to be labour intensive. It is also possible you will not have the expertise.	Usually done for you, with scores and a level of analysis provided.
Are filters available?	It may be possible through Survey Monkey to create filters, for example by characteristics.	Usually provided as part of the service by many providers.
Can I benchmark and compare to other schools?	This is unlikely, unless you undertake the same survey with a group of other schools and share results.	Likely to be available from some providers, who will compare your score with other schools.
How are results distributed?	Usually through printing off data, tables, charts and scores.	Variety of methods from paper based, consultant delivered, through to fully online (with downloads) as in our case. We include an online dashboard, report, recommended actions, presentation, heatmaps and comments, that you can anonymously respond to.
Support with actions	You will need to decide on actions to take.	Most providers provide analysis, and you will still need to agree on actions. We provide suggested actions within the report and a results review call to support implementation.
Following up survey actions	Through discussion	Ongoing feedback tools may be available (e.g., Welbee Voice) to anonymously follow up before the next survey.
Support with implementation	Whatever resources or expertise you have in school.	Providers may have resources to help. In our case, we provide a toolkit and ongoing remote support.
Likely costs	Cost of staff time, opportunity cost of what they are not able to do, and possible cost of a paid Survey Monkey account (depending on delivery method).	From £247 to over £1500 depending on the provider and size of school. Our pricing is £247 to £647 + VAT per annum depending on pupil numbers (with a money back guarantee for first time customers).
Return on Investment	As long as actions are the right ones and implemented effectively, you should get a return on the time invested.	You should expect a return significantly more than the cost of the survey or annual subscription.

## Ready to run your first survey?

I hope that the steps detailed in this guide will help you to successfully run your own survey and gauge where you are now, so that you can plan your goals and actions, before making improvements where it matters most.

After all, staff are your most important and expensive asset and putting them first has significant benefits for them, your students and the school, both now and for the long-term.

We know this because it is something that we have helped many schools to achieve, with our own survey and systemised process and follow up.

If you can see the real benefits of running a staff wellbeing survey but would like some extra help and guidance - we are here to help you.

Click the button below to book a short meeting and we will show you a structured way to annually measure staff wellbeing, implement action and track progress in your school.

Even if you have some questions on running your own survey - our mission is to support all schools to make staff wellbeing simply a part of everyday culture, whether they are a customer or not.

**BOOK A MEETING**

*“I enjoy working with Welbee because you get the personal touch and they actually care about the impact they’re going to have on your school. They want to make a difference.*

*To summarise Welbee? They’re caring, knowledgeable, insightful, understanding and very professional.”*

**Mark Eager, Principal, Brixham College**

welbee.co.uk  
01277 554 001  
support@welbee.co.uk

