Survey Design and Analysis

Case Study

A Probation Trust

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1: Background

In these times of public sector spending cuts, the effectiveness of any public sector organisation depends on the engagement of its staff and the Probation Service is no different. As part of their efforts to ensure staff are engaged, our client, one of 42 Probation Trusts, carry out a staff survey every 2 years in order to answer these 4 questions:

1. What are their staff saying?
2. Who is saying what?
3. How have staff attitudes changed from the survey carried out 2 years ago?
4. Where are the opportunities to improve staff engagement?

2: Why the Trust came to us

The Trust made the decision to change from their existing supplier and engage us instead to perform the analysis. They were interested in our ability to take a global look at the whole survey and identify themes among the responses, rather than the traditional method of summarising the answers question by question. With over 60 questions in total being asked in the survey, they realised that our experience and innovative approach to statistical segmentation and key drivers modelling would give them more insight into ways of managing change within the organisation. We worked closely with our partner Improvement Skills Consulting from the Jigsaw network who are experts in change management to ensure that our results were presented in a way that would lead to an actionable plan for improving staff satisfaction and engagement.

3: The Solution

In total, just over 250 members of staff responded to the survey. On examining the questionnaire, we identified that the questions covered 17 themes in total ranging from Overall Perceptions of the Trust to more specific themes such as My Team, My Manager, Equal Opportunities, etc. Within each theme, a number of questions were asked, nearly all of which were in the form of statements to which respondents were asked to choose an answer from a scale that ran from Agree to Disagree.

This kind of format is particularly suited to a thematic analysis as opposed to a question by question analysis as respondents usually give similar responses to a whole theme rather than evaluating each question on its own merits. We therefore carried out a segmentation analysis for each theme in turn using a variety of multivariate statistical methods that we are particularly strong in. Typically this resulted in 3 to 5 segments of respondents for each theme. Within each segment, respondents tended to give similar patterns of answers.

We summarised the segments using the chart format as shown on the next page. This chart is for the Leadership theme which consisted of 3 questions to which respondents were invited to agree or disagree. Our segmentation analysis resulted in 5 segments with very different pattern of responses.

The largest segment accounted for 50% of respondents who tended to be satisfied with all aspects of leadership. In contrast to this segment, 15% of respondents fell into a segment that was dissatisfied with all aspects of leadership.

The other 3 segments accounting for 35% of respondents, held more mixed views. All 3 were dissatisfied with leaders' ability to listen and respond to views of staff. One segment was satisfied with both the overall quality of leadership and their support for new ideas. Another segment was satisfied with leadership quality

but not with support for new ideas whilst the 3rd segment was the other way around i.e. satisfied with support for new ideas but not with overall quality of leadership.
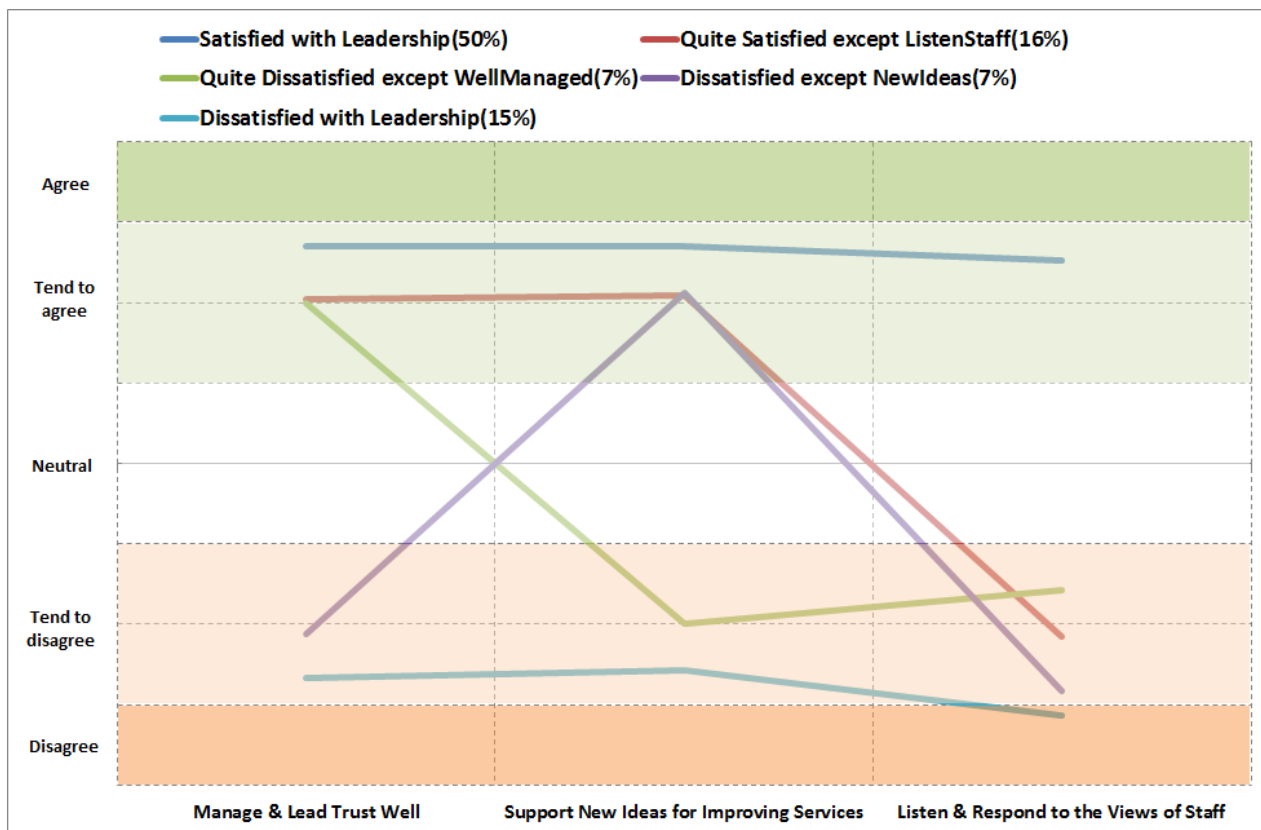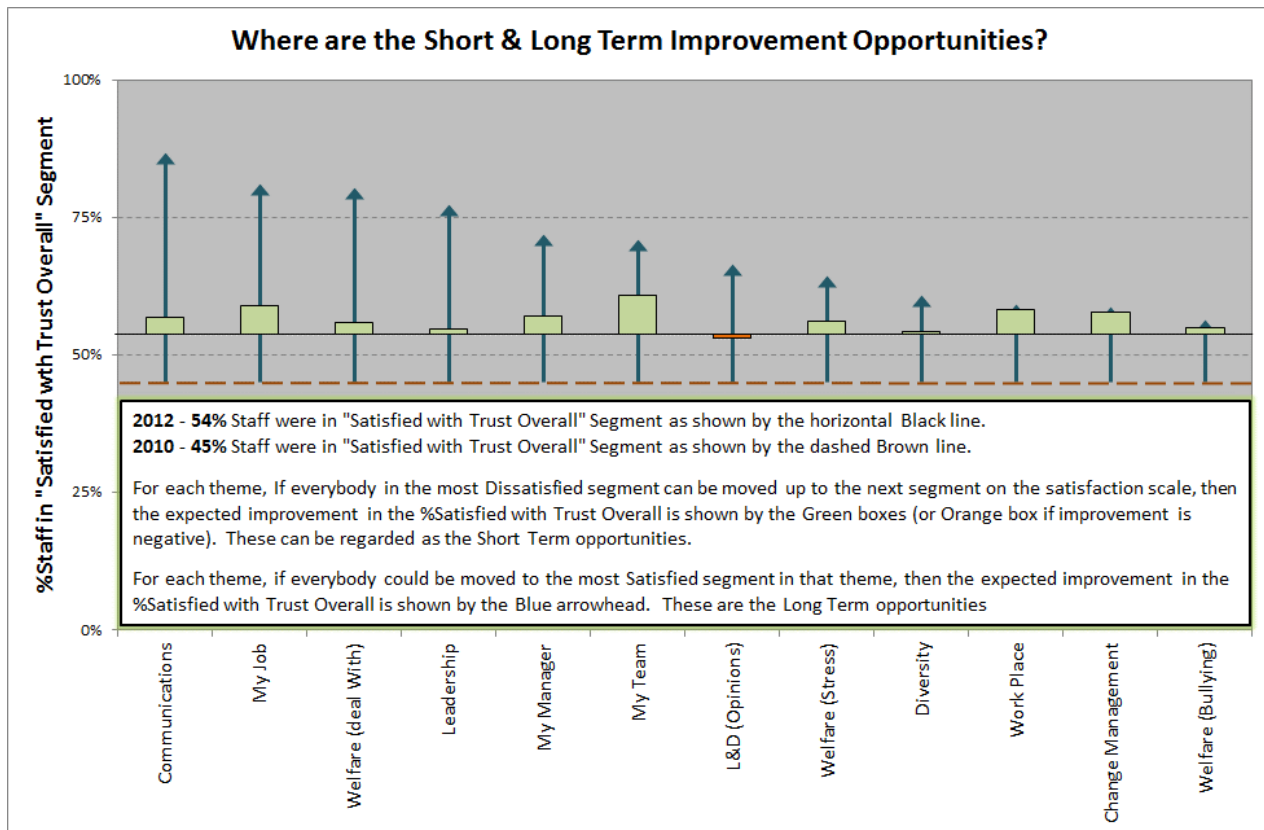

Having identified the segments for each theme, we then proceeded with Key Drivers Modelling to see which themes were best correlated with Overall Staff Satisfaction with the organisation. In the case of Leadership there was a clear correlation as shown in the next chart.   For each of the 5 Leadership segments, we broke down the respondents by the Overall Satisfaction segment that they fell into of which there were 4. It is very apparent that of those that were Satisfied with Leadership, about 80% were also Satisfied with The Trust Overall. In contrast, only 5% of those Dissatisfied with Leadership were Satisfied with The Trust Overall so this clearly showed that Leadership is a Key Driver of Overall Staff Satisfaction.
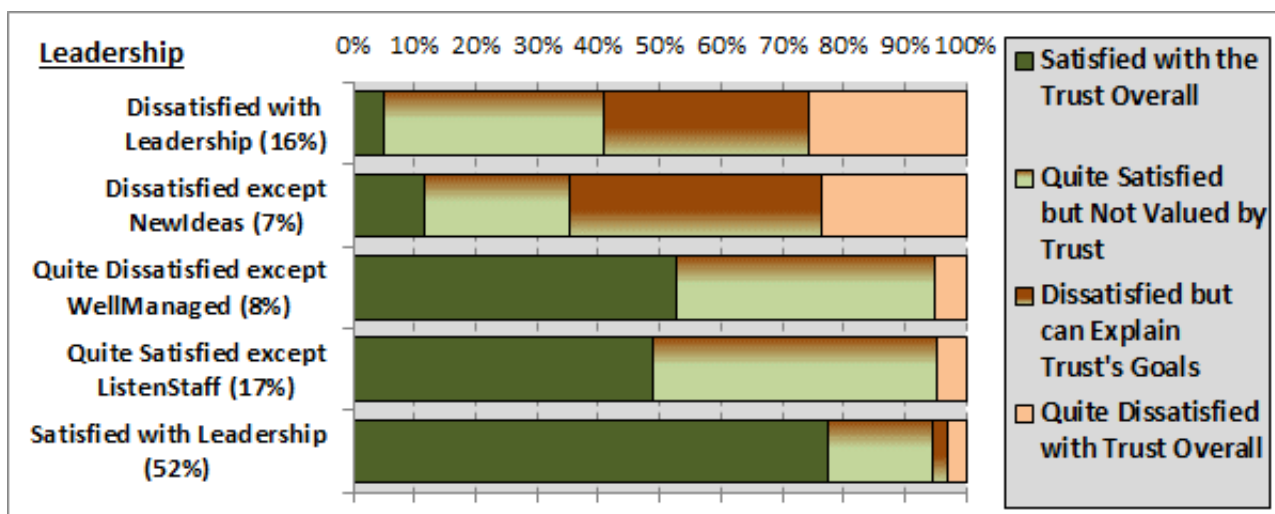
4: The Results

We combined our Thematic Segmentation results with our Key Drivers Model to produce the output shown in the chart below. This was an extremely visual way of showing what the Trust could do in the short term to improve staff engagement and what they should aspire to in the long term. By also comparing the overall satisfaction achieved in the latest survey with that seen in the previous survey, this showed that staff satisfaction has improved and that the short term opportunities to improve were of a similar magnitude to that achieved over the last 2 years. In effect, we were telling them that the short term opportunities were well within their capabilities to achieve.

Where are the Short & Long Term Improvement Opportunities?

%Staff in "Satisfied with Trust Overall" Segment

2012 - 54% Staff were in "Satisfied with Trust Overall" Segment as shown by the horizontal Black line.
2010 - 45% Staff were in "Satisfied with Trust Overall" Segment as shown by the dashed Brown line.

For each theme, If everybody in the most Dissatisfied segment can be moved up to the next segment on the satisfaction scale, then the expected improvement in the %Satisfied with Trust Overall is shown by the Green boxes (or Orange box if improvement is negative). These can be regarded as the Short Term opportunities.

For each theme, if everybody could be moved to the most Satisfied segment in that theme, then the expected improvement in the %Satisfied with Trust Overall is shown by the Blue arrowhead. These are the Long Term opportunities

Themes: Communications, My Job, Welfare (deal With), Leadership, My Manager, My Team, L&D (Opinions), Welfare (Stress), Diversity, Work Place, Change Management, Welfare (Bullying)

Our key conclusions were:

1. The top 3 short term opportunities lay in the themes of My Team, My Job and Workplace (layout).
2. The top 3 long term opportunities lay in the themes of Communications, My Job and Dealing with Welfare issue.
3. There was little opportunity to improve in the Diversity theme which was good news for the Trust as they had made great strides over the last 2 years to ensure that they were well regarded for equality and diversity issues.

We produced several versions of the report tailored to different audiences (Management Team, Staff, Change Management), reflecting our underpinning principle of making statistical analysis accessible and meaningful. Our clear list of opportunities to improve were a key input to the management team's planning process, leading to a variety of actions to continue the improvement in staff engagement they had achieved over the last 2 years.