



EDUCATION DEPARTMENT

Survey Design

An Activist Handbook Supplement

Introduction

This supplement to the Standing Committees Activist Handbook is designed to walk you through the steps necessary to gather information from members through surveys.

Whether used to test the worker-to-worker system or determine practices in bargaining, the surveys you use must be designed to collect the information you need. This supplement is intended to provide direction if training is needed for your local please contact the Regional Education Representative through proper channels.

Surveys

Surveys are a method to gather information from our members. Why we want this information and how we will use it determines our purpose for conducting a survey. Designing a survey that will give reliable information is not an easy task. Steps must be taken to ensure the survey instrument will give the information needed in a format that will be clear and understandable. There are many things to consider. A valid survey can be de-railed pretty fast if you don't know where you are going.

Why use surveys? What do they do for you? When do you use them? What information are you trying to collect from a survey? How long does it take to do a survey?

If you can't answer these questions, is it fair to ask your members to take the time to answer the questions on your survey?

When to use a survey

Determining why you need to survey your membership is one of the most important steps you can take when developing your survey. What is it that you need to learn or understand that requires this type of information / data? Some of the reasons you may want to survey your membership are:

- ◆ Data Collection (need to get more information on an issue or concern)
- ◆ Validate Information (get support of or disagreement on a position)
- ◆ Determine what the membership's interest or needs are (what are the educational interests, what are the needs for future collective bargaining?)
- ◆ To get buy-in (your opinion counts)
- ◆ Gives all members a voice (allows you to collect large amounts of data anonymously)

The key to gathering the information you need during the survey process is the instrument itself – the survey.

Six steps to developing a survey

1. Identify the purpose/goal of the survey
2. Design the survey instrument
3. Pilot the survey
4. Distribute and collect
5. Tabulate and analyze the results
6. Report the findings



Step One: Identify the purpose/goal of the survey

- ◆ **Why** survey – what is the purpose?
- ◆ **What** will it measure – feelings, people, strengths?
- ◆ **Who** – will be involved and receive the survey? Do you give it to everyone; have a random sample or a sample selection? Discuss the pros and cons of surveying everyone versus doing a sample survey. Sample selection is statistically sound, but doesn't allow for input or buy in from everyone.
- ◆ **How** – will the results be used?
- ◆ **When** – will it happen?

Put this in a cover letter or introductory paragraph to the survey signed by the leadership.

Step Two: Design the survey instrument

What will the survey look like and how will members respond? These are questions that need to be answered to assist you in designing your survey. **Once you understand what information you want to gather from the survey, determine the best possible way to ask the members the questions.** Number your questions sequentially on the survey and never allow more than one response per question. Break the question down if more than one response is required.

Ask your survey respondents for their contact information (including e-mail address and cell phone number), shift, job title, years of seniority, and anything else relevant to your survey goals. With this information, you can analyze the results and follow-up with your members.

It's a good idea to have an "ask" at the end of your survey. For example, leading up to contract negotiations, a bargaining survey might include a check off box for different ways to get involved. If you're surveying members about their interest in joining standing committees, include a list of the different committees and ask which ones they are interested in joining.

To avoid confusion, give clear directions on how to complete the survey. Instructions should be concise and to the point to avoid misinterpretation.

□ Step Three: Pilot the survey

When surveying a large population it is beneficial to make sure you will get the results you want before mass-producing and distributing it. Will the survey you have developed work? Will it get you the results/information you are looking for? The only way to know for certain is to pilot or “test” the survey. Gather a few people in a group and have them complete the survey and give feedback. Did they have problems filling it out? Could they understand all of the directions? Did they have any difficulties understanding the questions? Do they have any suggestions for improvement? These are questions that you would ask. Now ask yourself, did I gather the information I needed from this sample group? Did their responses allow me to move ahead on the information I required? If not, try again. Be more specific. Narrow your goal or purpose of the survey. Get to the point. Additionally, while piloting the survey you can time how long it takes to complete.

Make changes based on what you learned as a result of the test and get approval from your leadership before you mass print. It is often helpful to have your leadership be a part of the pilot so they can see first hand what they are asking their members to do. Their support and participation goes a long way in lending credibility to your survey.

□ Step Four: Distribute and Collect

Now that you have designed the survey, you must determine the distribution and collection method and clearly communicate it to all those involved. Listed below are some ways to distribute and collect surveys.

Ways to distribute the survey:

- ◆ Mail
- ◆ Hand out
- ◆ Meeting
- ◆ Orally/Phone
- ◆ E-mail survey
- ◆ SMS (text) survey

Data shows that 97% of text messages are read within 15 minutes of delivery. That's a great way to engage! After a text survey, you can use your SMS interactions to increase communication with your membership to recruit turnout for events, bargaining updates, and more. There are plenty of sites that offer this service – check for pricing and ease of use.

- ◆ Online survey

When creating an online survey, use a site like SurveyMonkey.com. Survey Monkey has both free and paid versions. Using the free version, you'll get 10 questions, 100 respondents, 15 question types, and light theme customization and templates. Paid versions allow for more questions, more respondents, and other features. You can password protect your survey to make sure only your membership can respond. Steer clear of formats like Google surveys because they often collect your data.

Ways to collect the survey:

- ◆ Mail
- ◆ Hand in
- ◆ Drop Box
- ◆ Phone In
- ◆ Text responses
- ◆ E-mail

When designing your survey, add clear instructions at the end directing the participants on what they are to do with the survey, for example:

“When you have completed this survey, drop it off/hand it in/ mail it to/ give to _____ (person) at _____ by _____ (deadline date).”

Whatever method you select, you must make sure you can guarantee confidentiality and anonymity if necessary and appropriate.

Step Five: Tabulate and analyze the results

After the deadline for returning the surveys has passed, prepare to count the results. You may need volunteers to help you if you surveyed a large population. Use retiree groups or other committees if appropriate.

Using a clean survey, tally the total number of responses next to each question. Analyze the results and determine if you will use total numbers or percentages to report the findings. Format your results into graphs, charts or other easy to read figures. Record how many surveys were sent out and how many surveys were returned. Figure out what percentage of the population responded.

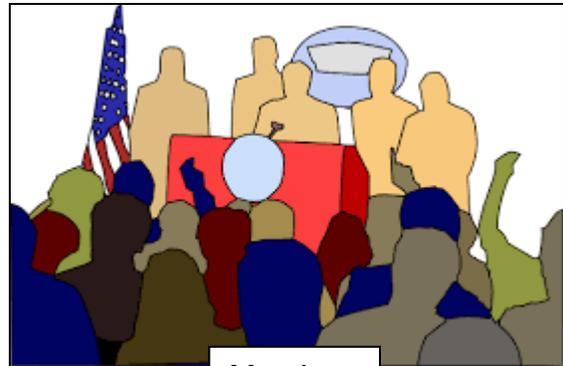
Using an online tool, like an SMS service or online survey site, makes this step a lot easier.

□ **Step Six: Report the findings**

Once you have analyzed the results, you should report the findings to both your leadership and those who participated in the survey. Communicating the survey results to the people who took the time to complete the survey is essential. You want them to “buy into” the results of the survey because they will be impacted by the results. A few ways that you can communicate the survey results:



Newsletter



Meetings



One-on-One



Phone



Leaflets/Postings

Again, review the results of your survey with your leadership before releasing the information to the membership.

Response scales:

Yes/No Scale

- a. Yes
- b. No

Extent Scale

- a. To a very little extent
- b. To a little extent
- c. To some extent
- d. To a great extent
- e. To a very great extent

Agree/Disagree Scale

- a. Strongly disagree
- b. Disagree
- c. Undecided
- d. Agree
- e. Strongly agree

Quantitive Categories

- a. 0 – 5 years
- b. 6 – 10 years
- c. 11 – 15 years
- d. 16 – 20 years
- e. 21 – up years

Further points to consider:

- ◆ Keep the survey to a reasonable length --Ask yourself, would I want to fill out this survey?
- ◆ More than 2 –3 pages is intimidating. A good rule of thumb for the number of questions is five to fifteen.
- ◆ Questions should be specific and well defined.
- ◆ Ask close-ended questions when possible.
- ◆ Make sure questions are relevant. Do not ask for “wish lists.” Be realistic.
- ◆ Words used should be familiar to the target audience.
- ◆ Don’t use controversial meanings.
- ◆ Vary the length of the questions. Brevity is desired, but a meaningful response is wanted.
- ◆ Group the questions by topic area.
- ◆ Remember: while surveys are a great way to collect data, a survey should never replace one-on-one conversations. Talking face-to-face increases the likelihood that members will participate in their union.
- ◆ Remember to ask participants for their contact information, including cell phone numbers and e-mail addresses.
- ◆ Always include an “ask” at the end. This could be a simple check off box asking for more information about the union and how to get involved or a series of asks regarding how someone would like to be involved.

Survey Checklist of Activities

Dates

- _____ 1. Determine objective and purpose
Why (purpose) _____

What (will be measured) _____

Who (will be surveyed) _____

How (will results be used) _____

When (will it happen) _____

- _____ 2. Tabulate by hand or computer
Who will tabulate? _____
- _____ 3. Design questions
Determine type of questions and responses
Rough draft ready for leadership
Revise if necessary
- _____ 4. Pilot survey with leadership and random group
Revise if necessary
- _____ 5. Distribute
Determine method _____
- _____ 6. Collect surveys
Determine method _____
- _____ 7. Tabulate results
Determine method _____
- _____ 8. Report findings
Leadership
Membership

UAW Education Department

Date

To All Local XXX Union Members

During the week of September 3, XXXX, we will be conducting various information meetings including a survey of our membership in regard to the programs being offered at the local.

The purpose of the survey is to try and get some information regarding the types of programs/classes you are most interested in. Do you know the correct procedure to follow for tuition reimbursement? Are you more likely to attend evening or weekend classes?

Please attend the meeting when notified and complete the survey. Your input is needed.

Only through your input and participation will the needs of this membership continue to be met.

In Solidarity,

(Union President's signature)

opeiu494

Sample Surveys

The following samples demonstrate different formats and responses for posing questions. Taken together, this list of questions would not be a good survey. Why?

<p>1. Yes/No Would you advise your children to apply to work here? ____ Yes ____ No Comment _____</p> <p>2. Agree/Disagree The company can be trusted to implement a drug-testing program without union input or negotiation. ____ Agree ____ Disagree ____ Not Sure Comment _____</p> <p>3. Scale How would you evaluate the working conditions in your area? ____ Excellent ____ Good ____ Fair ____ Poor Comment _____</p> <p>4. Frequency How often do you attend union meetings? ____ Frequently ____ Sometimes ____ Seldom ____ Never Comment _____</p> <p>5. Rank Please indicate the importance of the following bargaining issues by ranking them 1, 2, 3, 4. ____ Wages ____ Health plan ____ Pension ____ Work rules</p> <p>6. Fill in the blank Each week, I spend approximately _____ minutes/hours (circle) waiting for parts.</p> <p>7. Open ended What do you believe the union's top bargaining priority should be? _____ _____</p>

There is no central theme or focus. When you develop a survey for a particular campaign, the questions should target a particular objective.

Survey of Union Members

1. Do you know who your steward is?

- Yes
 No

2. How often do you talk to your steward about union or job matters?

- Daily
 Weekly
 Monthly
 Every other month
 Twice a year or less
 I've never spoken to my steward about union or job matters

3. Do you know who your local union officers are?

- Yes, all of them
 Yes, some of them
 No

4. How often do you talk to your local union officers?

- Daily
 Weekly
 Monthly
 Every other month
 Twice a year or less
 I've never spoken to my union officers

5. How often do you attend union meetings?

- I never miss a meeting
 Every other meeting
 3-5 a year
 Twice a year or less
 I've never attended a union meeting

6. What is your main source of information about what is going on in the union (including contract negotiations)?

- Union meetings
- Union newspaper
- Union website
- Talking with my co-workers
- My steward
- Facebook
- Other

7. What can your local union leadership do to increase participation in the union? Check all that apply.

- Ask members to attend union meetings
- Ask members to attend recreational/social events
- Plan more recreational/social events
- Post on Facebook and other social media outlets
- Text us reminders about meeting dates and times
- Text us reminders about recreational/social events
- Ask members to join standing committees
- Other (please explain):

8. I'd like to get more involved in my union by:

- Attending more union meetings
- Attending recreational/social events
- Helping to plan recreational/social events
- Wearing a show of solidarity (buttons, t-shirt) during negotiations
- Joining a standing committee
- Other (please explain):

UNION COMMUNICATION

The following are examples of statements and/or questions that could be considered for an attitude survey.

	Strongly Agree	Agree Somewhat	No Opinion	Disagree Somewhat	Strongly Disagree
It's important to be involved in my local union.					
There is value in being a member of my union.					
My local union wants me to be involved in union events and activities.					
I can talk to my steward about issues on the job.					
I am more likely to attend a union meeting if someone asks me personally, rather than reading a flyer.					
I can count on my union sisters and brothers to have my back.					
I could join a local union standing committee if I wanted to.					

Sample Bargaining Questionnaire

Dear member,

Local 0000 is surveying our membership to help prepare for our upcoming contract negotiations. This survey is a chance to share your opinions on the workplace issues that concern you the most. The completed questionnaires will be carefully tabulated and the results will be used by your bargaining team to help develop proposals and set priorities.

Please return your survey to _____ by September 25 to make sure your voice is heard.

In Solidarity,

(Union President's signature)

What are your bargaining priorities?					
Collective Bargaining	YES	NO			
Before you received this survey, did you know that UAW Local 0000 represents you and your co-workers at?					
Did you know that the union, Local 0000, negotiates a contract with your employer covering wages, benefits, and working conditions?					
Did you know that union members are eligible for representation in workplace disputes?					
Wages and Benefits					
How important are the following issues? <i>(Please circle your response)</i> 1=Not important 5=Very Important					
Annual percentage increases	1	2	3	4	5
Annual flat cents-per-hour increases	1	2	3	4	5
Shift differential pay	1	2	3	4	5
Cost of health insurance	1	2	3	4	5
Paid leave	1	2	3	4	5
Retirement benefits	1	2	3	4	5
Overtime calculation	1	2	3	4	5
Pay scale/steps	1	2	3	4	5

	YES	NO
Are you happy with the wage increases we've been receiving at _____?		
Are you satisfied with how the employer handles overtime pay?		
Are your retirement benefits adequate for you to retire comfortably?		
Does your health insurance provide enough coverage?		
Leaves of Absence & Holidays	YES	NO
Are you able to use your leave when you want to?		
Annual Leave		
Personal Sick Leave		
Parental Leave		
Bereavement Leave		
Is the current leave policy fair?		
If not, how should it be improved?		
Increase rate of accrual?		
Eliminate waiting period?		
Provide sick leave for family illness?		
Provide sick leave cash out upon retirement or termination?		
Include parental leave for fathers?		
Improve maternity leave?		
Include adoption as reason for leave?		
Is the current holiday provision adequate?		
If not, how should it be changed? _____ _____ _____		
Are there holidays you think we should get off that we don't currently? _____ If yes, which ones? _____ _____		

Grievances and Discipline	YES	NO
Have you had issues with your supervisor(s)?		
Have you had issues dealing with HR?		
Have you been disciplined unfairly or in an untimely manner?		
Have you been bullied by a supervisor?		
Contract Priorities		
Please rank the following from 1 to 10 in order of which are the most important to you and what you think your negotiating team's bargaining priorities should be. 1=Not important 5=Very Important		
Job security	1	2 3 4 5
Wages and other pay	1	2 3 4 5
Health insurance	1	2 3 4 5
Other benefits	1	2 3 4 5
Health and safety	1	2 3 4 5
Respect from management	1	2 3 4 5
Leaves of absence	1	2 3 4 5
Access to tools and training	1	2 3 4 5
Workload	1	2 3 4 5
Other Issues		
Please describe any additional problems or concerns that you face as an ____ employee or give examples from the questions above.		

To win the new Collective Bargaining Agreement, select all of the following you would be willing to do:	
Wear a button or sticker	Talk to a co-worker about the union
Attend a rally or action	Volunteer
Other (please specify)	

REMEMBER: These are only sample formats. Your final questionnaire should be developed after consultation with rank-and-file membership, local union leadership, and bargaining committee members!

Once you format the survey, write a cover letter or introductory paragraph signed by the leadership. In it, indicate why you want the information you are requesting and what you will do with it. Also include how and when you will report it back (See sample letter.)

Sample Response Notice

Date

Thank you for taking the time to complete our local membership survey. The results are being tabulated and will be reported in next month's newsletter. See what our membership thinks.

In solidarity,

(Union President's signature)

opeiu494

Summary

Following these steps ensures your survey will be credible and get results. For additional samples of union surveys check online with various labor sites.

opeiu494
10/02
Revised 7/17



EDUCATIONDEPARTMENT

UAW EDUCATION DEPARTMENT

**PUB. 507
Revised Cover July 2017
Reprinted July 2017
Qty. Printed 1k**

**Additional copies of this publication are available
from the:**

**UAW PURCHASE AND SUPPLY DEPARTMENT
SOLIDARITY HOUSE
8000 East Jefferson Avenue
Detroit, Michigan 48214
uawsupply@uaw.net
(313) 926-5221**