

Retirement and Departure Intentions Survey

Users Guide

1. Gaining buy-in
 - a. It is important that initial contact is made directly with either the CEO or HR Director of each organization to explain the survey process and the benefits to the organization.
 - b. Organizations agreeing to the process are committing to the following:
 - i. If utilizing an electronic survey the organization will provide either a comprehensive list of employee email addresses for the Workforce Development Board to directly e-mail the survey or agree to email a survey link to all employees on the Workforce Development Board's behalf.
 - ii. If utilizing a paper and pencil survey instrument the organization is committing to distribute survey instruments to all employees and provide for an anonymous/confidential collection method.
2. Administering the Electronic Survey via SurveyMonkey
 - a. Customize survey name in SurveyMonkey to align with the specific organization.
 - b. Add logo of local workforce development board to the survey.
 - c. Customize the opening paragraph of the survey as noted below. Items in parenthesis () need to be personalized:

We are working in conjunction with the (*LOCAL WORKFORCE DEVELOPMENT BOARD*) and local educational institutions to conduct a comprehensive assessment of the healthcare workforce needs in the (*GEOGRAPHIC AREA*), and more specifically, in our institution. The information you provide in this survey will be used for forecasting changes in the future workforce needs and for necessary planning to address those changes. The survey is being administered by the (*LOCAL WORKFORCE DEVELOPMENT BOARD*) to ensure confidentiality and anonymity of responses. Please be candid in your responses as they will remain **STRICTLY CONFIDENTIAL** and will be reported only when grouped with other responses. For questions regarding this survey, contact (*CONTACT NAME AND TITLE*) at (*LOCAL WORKFORCE DEVELOPMENT BOARD*) at (*CONTACT PHONE NUMBER*).

- d. Be sure to either select the "thank you" page option, or direct completed surveys to the organization's homepage.
- e. Import employee contact information into SurveyMonkey, including email address, first name and last name of each employee. See SurveyMonkey for proper importing format.
- f. Send cover email to all employees, a sample is presented on page 3. Note that items presented in square brackets [] contain SurveyMonkey specific fields and should not be changed. Items in parenthesis () need to be changed for each unique organization.
- g. Send reminder e-mail through SurveyMonkey one week after initial email. Send reminder only to individuals who have not responded at that point in time. A sample reminder email is presented on page 4. Note that items presented in square brackets [] contain SurveyMonkey specific fields and should not be changed. Items in parenthesis () need to be changed for each unique organization.

3. Administering the Paper and Pencil Survey via Teleform or similar program
 - a. Customize survey name to align with the specific organization.
 - b. Customize the opening paragraph of the survey as noted below. Items in parenthesis () need to be personalized:

We are working in conjunction with the (*LOCAL WORKFORCE DEVELOPMENT BOARD*) and local educational institutions to conduct a comprehensive assessment of the healthcare workforce needs in the (*GEOGRAPHIC AREA*), and more specifically, in our institution. The information you provide in this survey will be used for forecasting changes in the future workforce needs and for necessary planning to address those changes. The survey is being administered by the (*LOCAL WORKFORCE DEVELOPMENT BOARD*) to ensure confidentiality and anonymity of responses. Please be candid in your responses as they will remain **STRICTLY CONFIDENTIAL** and will be reported only when grouped with other responses. For questions regarding this survey, contact (*CONTACT NAME AND TITLE*) at (*LOCAL WORKFORCE DEVELOPMENT BOARD*) at (*CONTACT PHONE NUMBER*).

- c. Set up confidential/anonymous return process either utilizing postage-paid business reply mail envelopes or secure drop boxes.
 - d. Personalize and print cover letter to be distributed to each employee. Utilize cover letter template provided on page 5.
 - e. Completed surveys should be delivered to local workforce development board for data entry and analysis.
4. Altering the Survey or Adding Questions
 - a. Questions specific to each organization can be added after the last question in the survey. It is extremely important that the existing questions remain intact to allow for comparisons among the various organizations' data. Altering of existing questions is discouraged and will affect both the reliability and validity of the data.
5. Acknowledging the Survey Authors
 - a. When utilizing a printed version of the survey instrument, organizations will be required to place a copyright notice as follows: © 2006 Fox Valley Healthcare Alliance
 - b. When utilizing the electronic version of the survey instrument, organizations will be required to place a copyright notice at the end of the opening paragraph as follows: © 2006 Fox Valley Healthcare Alliance
6. Tips to successful implementation
 - a. Partner with a local community/technical college or university research department for analysis of results.
 - b. Establish good communication throughout the entire process.

Sample Cover Email

Email Subject: Feedback Requested: Retirement and Departure Intentions Survey

Dear [FirstName],

Planning for the future workforce will be critical for all healthcare employers. (*ORGANIZATION NAME*) is working with a group of healthcare employers, local educational institutions, and the (*LOCAL WORKFORCE DEVELOPMENT BOARD*) to conduct a comprehensive assessment of the healthcare workforce needs in (*GEOGRAPHIC AREA*), and more specifically, in our organization. A survey has been developed and is being distributed to all employees at (*ORGANIZATION NAME*) and other healthcare facilities in the (*GEOGRAPHIC AREA*). We would appreciate your feedback.

This survey is voluntary, but we encourage you to take the time to fill it out because it will help us identify trends in the workforce and to recruit or educate employees.

The electronic survey should not take more than five minutes to complete and the results will be sent directly to a third party for compiling. Your feedback will provide valuable information that will be utilized for workforce planning for the future.

The survey results are confidential - (*ORGANIZATION NAME*) will only receive a report showing the overall responses. If you should have any questions on the survey, please contact (*CONTACT NAME AND TITLE*) at (*LOCAL WORKFORCE DEVELOPMENT BOARD*). He/She can be reached at (*CONTACT PHONE NUMBER*).

To access the electronic survey please select the link below.
[SurveyLink]

Please complete the survey no later than (*RETURN DATE*). You may receive an electronically generated follow-up email reminding you to complete the survey. As stated previously, your response and name will remain confidential and will not be accessible by any (*ORGANIZATION NAME*) employee.

Thank you in advance for your participation in this important endeavor.

(*ORGANIZATIONAL HR CONTACT/CEO SIGNATURE AND INFO*)

Please note: If you feel you have received this e-mail in error, please click the link below, and you will be automatically removed from our mailing list. [RemoveLink]

Sample Reminder Email

Email Subject: Reminder: Retirement and Departure Intentions Survey

Dear [FirstName],

This is a friendly, electronically generated reminder to please take time out of your busy day to complete the Healthcare Retirement and Departure Intention Survey.

As I mentioned in my previous e-mail, a group of area healthcare employers and educators, along with our local Workforce Development Board have partnered to prepare and distribute an electronic survey to employees at each of our facilities. The survey should not take more than five minutes to complete and the results will be sent directly to a third party for compiling. *(ORGANIZATION NAME)* is distributing this survey to our employees with the hope that valuable information can be obtained to use for workforce planning.

Again, the survey results will be confidential - *(ORGANIZATION NAME)* will only receive a report showing the overall responses. If you should have any questions on the survey, please contact *(CONTACT NAME AND TITLE)* at *(LOCAL WORKFORCE DEVELOPMENT BOARD)*. He/She can be reached at *(CONTACT PHONE NUMBER)*.

To access the electronic survey please select the link below.

[SurveyLink]

Please complete the survey no later than *(RETURN DATE)*. Thank you in advance for your participation in this important endeavor.

(ORGANIZATIONAL HR CONTACT/CEO SIGNATURE AND INFO)

Please note: If you feel you have received this e-mail in error, please click the link below, and you will be automatically removed from our mailing list. [RemoveLink]

Sample Cover Letter

Dear [FirstName],

Planning for the future workforce will be critical for all healthcare employers. *(ORGANIZATION NAME)* is working with a group of healthcare employers, local educational institutions, and the *(LOCAL WORKFORCE DEVELOPMENT BOARD)* to conduct a comprehensive assessment of the healthcare workforce needs in *(GEOGRAPHIC AREA)*, and more specifically, in our organization. A survey has been developed and is being distributed to all employees at *(ORGANIZATION NAME)* and other healthcare facilities in the *(GEOGRAPHIC AREA)*. We would appreciate your feedback.

This survey is voluntary, but we encourage you to take the time to fill it out because it will help us identify trends in the workforce and to recruit or educate employees.

The survey should not take more than five minutes to complete and the results will be sent directly to a third party for compiling. Your feedback will provide valuable information that will be utilized for workforce planning for the future.

The survey results are confidential - *(ORGANIZATION NAME)* will only receive a report showing the overall responses. If you should have any questions on the survey, please contact *(CONTACT NAME AND TITLE)* at *(LOCAL WORKFORCE DEVELOPMENT BOARD)*. He/She can be reached at *(CONTACT PHONE NUMBER)*.

Please complete the survey no later than *(RETURN DATE)* and return it via *(RETURN METHODOLOGY)*. As stated previously, your response and name will remain confidential and will not be accessible by any *(ORGANIZATION NAME)* employee.

Thank you in advance for your participation in this important endeavor.

Sincerely,

(ORGANIZATIONAL HR CONTACT/CEO SIGNATURE AND INFO)

Encl. survey