

## 1. Introduction

UKRI operates within the public sector, and in a highly competitive market for employees with extremely specialised skills. It is imperative that UKRI maintains a high level of staff engagement in order to attract and retain the best talent. This requires a deep understanding of engagement levels, drivers and trends across different parts of the organisation so that evidence-based decisions can be made when planning targeted engagement interventions.

There are many reasons for taking action to develop employee engagement at UKRI:

- Ensuring that employees have a say in developing and improving ways of working can **generate savings through increased process efficiency**.
- Organisations with high levels of employee engagement have **reduced levels of staff turnover**.
- Employee engagement and willingness to share ideas and information is key to achieving and **sustaining innovation**.
- Involving and consulting employees in the early stages will **increase support for change**.
- Employees who are regularly consulted and involved feel **more valued and respected** and find their work **more rewarding**.
- Employees who are encouraged to share their problems quickly **build loyalty and trust** in their managers and are less inclined to leave.
- When individuals are put under increasing pressure to perform, their **wellbeing** may suffer and absenteeism can increase unless they feel able to share their concerns with colleagues and managers.
- High levels of employee engagement can improve performance levels and **reduce the need for costly disciplinary actions**.

These can all impact the effectiveness of UKRI to deliver its strategy, and all have budgetary implications.

The survey provider appointed will develop a replacement for the previous Civil Service People Survey from which UKRI is now excluded. It provides a real opportunity for UKRI to introduce a regular rhythm of bespoke, user-friendly surveys that can provide relevant, robust data on staff engagement levels and give the insight we need to drive actions for improvement.

Professionally executed surveys will enable leaders and managers in UKRI to build trust by listening to and acting upon the feedback from staff, highlight pockets of high engagement levels and opportunities for the sharing of best practice across the organisation, and will provide evidence to inform our engagement planning. In doing so, this supports the three pillars that make up our Employee Engagement Strategy recently approved at PFO: building trust by listening; driving collaboration by sharing; and enabling informed decision-making by engaging.

The specification has been developed using information and advice from colleagues at UKRI who have expertise and experience in the development and implementation of employee engagement surveys.

## **2. Aims & Objectives**

With this tender, we aim to identify an established partner who:

- has the necessary expertise and tools to deliver a professionally developed employee engagement survey that provides deep insight into the way our staff feel about working for UKRI
- is able to help to build the trust required to encourage good participation levels
- can provide a tried and tested platform for the collection of data and production of standard reports
- can provide any necessary training and access rights to a reporting tool, enabling team leaders to produce their own customised reports
- has the necessary behavioural science skills to support UKRI's own expertise with data interpretation, analytics and visualisations
- will present high level results to the senior leadership team
- can provide advice relating to post-survey action planning to address any areas highlighted for improvement
- has the ability to use AI to identify future risks to the business.

### **3. Background to the Requirement**

With headquarters in Swindon, UK, UKRI is a large and very diverse organisation formed in April 2018 from the merging of 7 separate Research Councils, Research England and Innovate UK, together with their associated centres, institutes and units. UKRI covers a wide array of activities, from arts and humanities to medical research and blue sky research activities. These are based across the globe, literally from pole to pole.

UKRI is therefore a very heterogenous organisation, with a wide variety of different functions, locations and activities. This diversity is reflected in the profile of the 8,000 employees, some of whom are highly specialised academics or scientists working in the Operations team, and others who provide support with HR, Finance and Strategy.

The staff is also geographically dispersed with some based in offices or laboratories across the UK, others working from home, several teams overseas including a significant cohort in the Antarctic, and some mobile groups based on ships at sea.

UKRI is funded by the UK government and classed as a non-departmental public body. Until 2020, all UKRI employees were invited to participate in the annual Civil Service People Survey but the organisation's exclusion from future surveys presented an opportunity to review the way in which we listen to the employee voice.

In September last year, the Organisational Development team within the UKRI HR function set up an Employee Engagement core team of 4 and a Working Group representing different Councils, functions and levels within UKRI. Together, they were tasked with developing a framework for engagement that focuses on active listening.

Past engagement surveys had provided feedback from staff that leaders and managers at UKRI were paying lip service to staff consultation and not taking action in response to the suggestions or concerns being raised. It was clear too that staff were finding it difficult to collaborate with colleagues in other parts of the UKRI, largely because of the complexity of the organisation and the difficulties faced when trying to find information about it. This was felt to be stifling innovation and the cross-fertilisation of ideas. Finally, feedback suggested that employees at UKRI did not feel any direct connection to the organisation's mission, vision, values or overarching goals and were therefore finding it difficult to understand the role they could play in its success.

The core team and working group appointed external consultants, to review past survey feedback and engage with staff through focus groups and 1:1 interviews in order to inform a framework for future engagement and a rhythm for listening.

It is important to understand that UKRI has a wealth of expertise internally when it comes to the development of surveys and analysis of data and we are seeking a partner to work with us to ensure that as much of the analytical work as possible can be handled internally.

External best practice today suggests a shift away from one large, annual survey towards more regular polls and pulse surveys, but it was recommended, initially at least, that UKRI continue to hold a large annual survey for benchmarking purposes and introduce 3x quarterly pulse surveys each year on more topical, one-off issues, such as the introduction of hybrid working. These pulse surveys will be planned and implemented internally using the UKRI Engagement Hub.

Recommendations for the new Employee Engagement Framework and Survey have been presented to the HR Senior Leadership team, to the People, Finance and Operations Committee and to the Joint National Consultative Committee and approved for implementation by all three.



#### **4. Scope**

The surveys will be open to all UKRI employees (i.e. people on the UKRI payroll), across many sites and geographical locations worldwide. Part-time employees will be in scope but contractors, temps and agency workers will not be invited to participate bringing the total number of invitees to around 7,000. However, history suggests that around 4,000 – 5,000 employees will choose to complete the surveys.

Initially, we would like to have one annual survey comprising approx. 50 questions whereby the results are compared with previous engagement scores and with external benchmarks. In addition to this, we are planning 3x smaller, quarterly surveys made up of one-off questions focused on more topical issues. These smaller surveys will be planned and implemented internally using the UKRI Engagement Hub.

It is important that the survey platform is compatible with UKRI IT systems and licences and, if web-based, it must be accessible from the most popular browsers, such as Microsoft Edge, Explorer, Chrome and Safari

## 5. Requirement

### SYSTEM REQUIREMENTS

Must have:

- Proven GDPR compliance, with a statement confirming details for participants (where and how long data will be held, how it will be used etc.), and confirmation that the data collected will belong to UKRI.
- Compatible with existing UKRI systems and licences, and if web based, must work with Microsoft Edge, Explorer, Chrome and Safari.
- Available on a variety of mobile platforms – Apple and IOS/Android.
- Offer the ability to complete in the survey over multiple visits, saving data between sessions.
- The surveys must be accessible for all (dyslexia / text to voice etc.), ideally with alternate language support.

Nice to have:

- Provider to set up dedicated SharePoint site to facilitate the exchange of documents with UKRI.

### PROFILE OF PROVIDER

Must have:

- Evidence of successful experience with surveys in the public and private sectors (customer feedback and/or testimonials; participation rates).
- Regular meetings with dedicated Project Manager, and in-house behavioural science expertise.
- A partnership approach, working with our own internal survey experts to process and analyse the data collected.
- Robust and proven methodologies to ensure results can be mapped to previous surveys i.e. Civil Service People Survey and compared with relevant external benchmarks.
- Support UKRI staff with technical issues 24/7 when survey is live.
- Help to set target rates of participation for meaningful insight and provide regular updates on participation rates by segment (as defined by UKRI) when “live”.
- Support the UKRI Employee Engagement team to build trust in the anonymity of the survey, the methodology and results, and leadership commitment to act on the feedback.

Nice to have:

- Shares UKRI Values: research integrity, striving for excellence, collaborative and innovative approach.
- Provide communication templates prior to / during survey to drive response rates and explain post-survey plans.
- Work with the Employee Engagement team to convince leaders and managers of the cost of poor engagement at UKRI, linking this with the organisation’s KPIs.

### SURVEY REQUIREMENTS

Must have:

- Using the survey questions provided by UKRI as the starting point, add any others required to map feedback to external and historical benchmarks and/or to identify key drivers for engagement.
- Allow time to run a test of the proposed survey on a small cohort of UKRI staff and use that feedback to make any necessary adjustments prior to go live across the whole organisation.
- Final sign-off of the survey questions, scales, communications etc. subject to agreement from UKRI.
- Using people data provided by UKRI, the provider will distribute the surveys annually by email to all participants, track responses and collate feedback.
- The survey must have an intuitive look and feel and use the UKRI branding provided.
- There must be an option to include definitions and for participants to add written comments beneath each question.

Nice to have:

- All surveys, polls etc. should be designed in such a way that data can be consolidated, directly compared or used together synergistically for deeper insight.
- Survey dates to be set by UKRI for publication in a timely way to discourage other surveys.

## **POST SURVEY REQUIREMENTS**

Must have:

- Provider to present methodology to senior leaders and an overview of the corporate results, highlighting progress and areas for concern.
- Benchmark all results against other organisations within the public sector/research and innovation sector.
- Produce standard reports in plain English with clear visuals, highlighting strengths, weaknesses and any trends over time, using previous survey results.
- Provide access to interactive reporting tool (and training) to enable UKRI staff to conduct further analysis of statistically significant data in any given segment using the demographic data fields provided.
- Set a minimum number of responses per report to preserve anonymity.
- Ensure written comments are anonymous and use True Sentiment analysis and Word Clouds based on relevance to highlight key themes.

Nice to have:

- Provide option to reanalyse data post-survey to take into account any changes in staff hierarchies.
- Support managers with effective action planning processes.
- Using AI/predictive analytics, identify future risks, threats or other key business outcomes and a live dashboard tracking the journey over time, by key theme.
- Filter out and separate any suggestions for improvement from the written comments.



The successful supplier will be expected to sign an NDA – Template Appendix E

## 6. Timetable

- Questions to be finalised and approved for first annual survey December 31<sup>st</sup> 2021.
- **First annual survey to be rolled out February/March 2022 for a period of 3 weeks.**
- Survey provider to present high level results to senior leadership team in May 2022, 6 weeks from launch of survey.
- Timetable for second annual survey to be finalised and approved by June 2022.

The date for the survey highlighted in bold above is a key milestone that must be met.