



Family Nursing & Home Care

Standard Operating Procedures Surveys

June 2024

Document Profile

Type	Standard Operating Procedures
Title	Standard Operating Procedures for Surveys
Author(s)	<i>Rachel Foster, Elspeth Snowie, Claire White, Claire Whelan, Mo de Gruchy</i>
Category	Governance
Version	1
Approval Route	Organisational Governance Approval Group (OGAG)
Date approved	06/06/2024
Review date	5 years
Document Status	This is a controlled document. Whilst it may be printed, the electronic version posted on the intranet is the controlled copy. Any printed copies of this document are not controlled. As a controlled document, it should not be saved onto local or network drives but should always be accessed from the intranet.

Version Control

Date	Version	Summary of changes made
June 2024	1	New standard operational procedure

Contents

Introduction	4
SOP 1 Survey Development.....	5
SOP 2 Access and Permissions	7
SOP 3 Management of surveys.....	8

Introduction

Surveys are useful instruments for gathering diverse perspectives, highlighting trends, and informing decision-making processes across a wide variety of aspects across the organisation.

This set of procedures aims to provide a process for the development of surveys within the organisation with either staff, service users or general public as its target audience.

Online platforms for creating surveys, may be used to create questionnaires and forms. This document will also set out the procedures for using one such platform, SmartSurvey™.

With SmartSurvey™, users can capture, analyse and report on virtually any type of data via an intuitive and easy to use dashboard. Registered under the Data Protection Act and certified ISO27001, SmartSurvey™ is widely recognised by businesses, educational institutes, charities and public sector organisations.

The development of the Standard Operating Procedures held within this document aims to promote good information governance, in line with FNHC's Information Governance Policy.

SOP 1 Survey Development

Purpose

The purpose of this SOP is to ensure that there is a process in place for the development of surveys within the organisation involving service users or the general public. This is to ensure that surveys are well-designed, effective, and engaging to the participants, resulting in the collection of accurate, high-quality, and reliable qualitative and quantitative data.

Scope

This SOP applies to anyone within Family Nursing and Home Care who wishes to develop a survey for the purposes of research & audit which involves seeking the views of service users or members of the public.

Core Requirements/Procedure

Define Objectives: Clearly define the objectives and goals of the survey, specifying the information to be collected, the target audience, how many responses are expected and the timeframe the survey will be collecting responses.

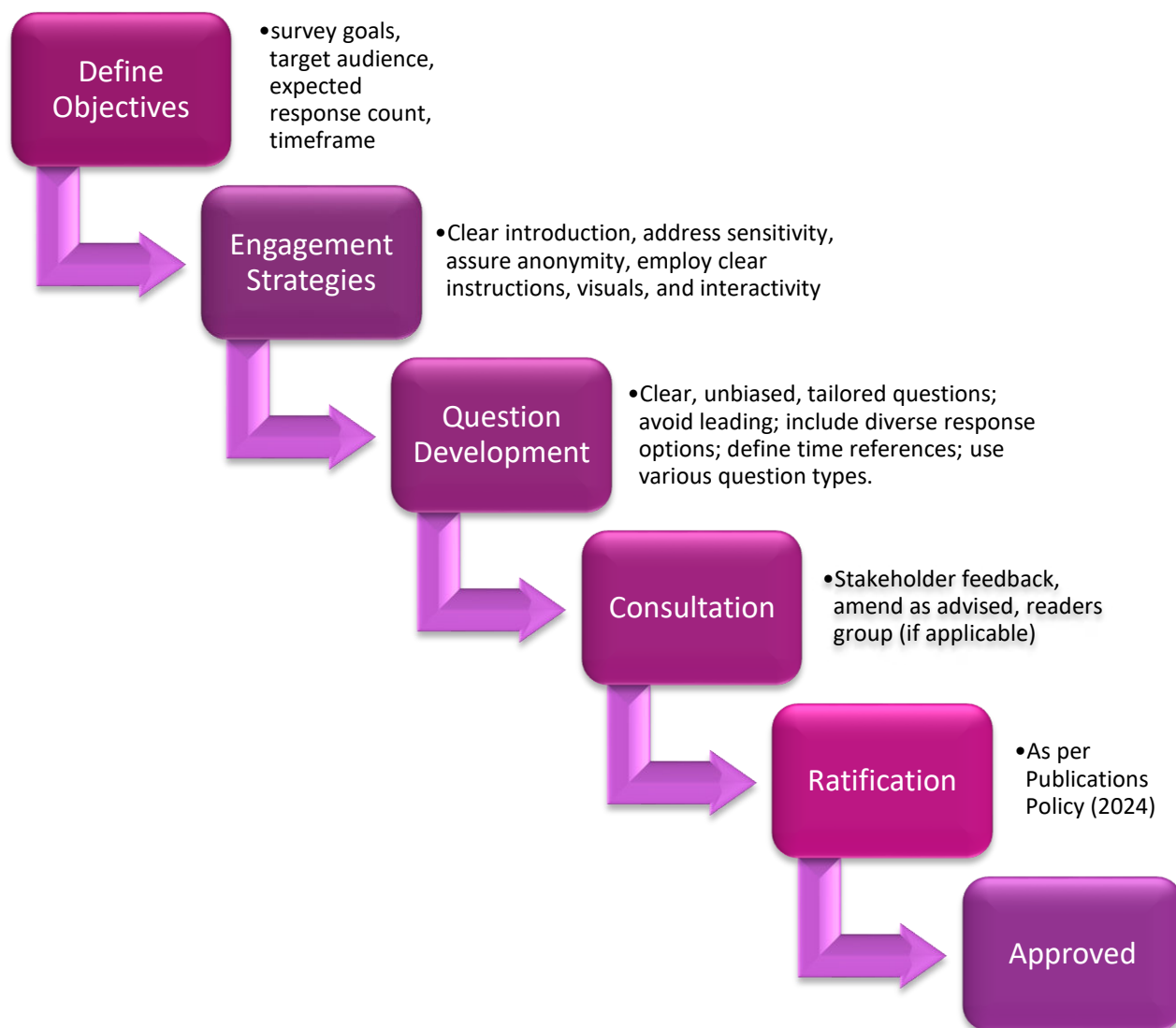
Engagement Strategies: Provide a clear introduction to the survey, outlining its purpose and the intended use of responses. If sensitive or personal questions are included, address this in the introduction, explaining their relevance to the objectives. Additionally, assure respondents of the anonymity and confidentiality of their responses. Implement strategies to engage respondents effectively, such as clear instructions, appealing visuals, and interactive elements.

Question Development: Develop clear, concise, and unbiased questions aligned with the survey objectives. Ensure questions are easily understandable and do not lead respondents to a particular response. Tailor questions to respondents' knowledge and experiences, using filter questions as needed. Avoid compound questions and maintain a logical order to minimise bias. Provide response options like "none of these" or "other" to prevent data skewing, and include "don't know" or similar options for closed questions, to ensure accuracy. Clearly define time references for consistency in responses. Utilise various question types, such as multiple-choice and open-ended, to gather both qualitative and quantitative data. Refer to **Appendix 2 Guidance on the Production of Patient Information Leaflets, within the Development and Management of Leaflets SOP 2023**.

Consultation: In line with FNHC's Publications Policy (2024), key stakeholders should be given an opportunity to provide feedback, and to do so within a reasonable timeframe. When amendments have been made following consultation with colleagues, the survey should be presented to the Head of Information and Governance for distribution to relevant members of the

Readers Group (if the survey is intended for service users / general public). Final changes can then be made to the survey before ratification.

Ratification: Follow the Approval Process which is detailed in section 3.4 of the **Publications Policy (2024)**.



SOP 2 Access and Permissions

Purpose

The purpose of this SOP is to ensure that there is a direct line of accountability in the allocating of access to the SmartSurvey™ platform.

Scope

This SOP applies to any employee of Family Nursing & Home Care who requires access to and use of the SmartSurvey™ online survey platform.

Core Requirements/Procedure

Only authorised personnel designated by the Director of Governance and Care are allowed access to the online survey platform, SmartSurvey™. In the absence of the Director of Governance and Care, the Head of Quality and Safety is permitted to grant access.

Access credentials (username/password) must be securely stored and not shared with unauthorised individuals.

Any changes to access permissions must be approved by the Director of Governance and Care.

Access to the SmartSurvey™ platform is limited, so the reasons for requesting access must be appropriate and justifiable.

Access to the SmartSurvey™ platform should not be granted for any longer than is necessary.

SOP 3 Management of surveys

Purpose

The purpose of this SOP is to ensure there is a system in place to maintain the organisation of surveys held on SmartSurvey™ and the data held within the responses.

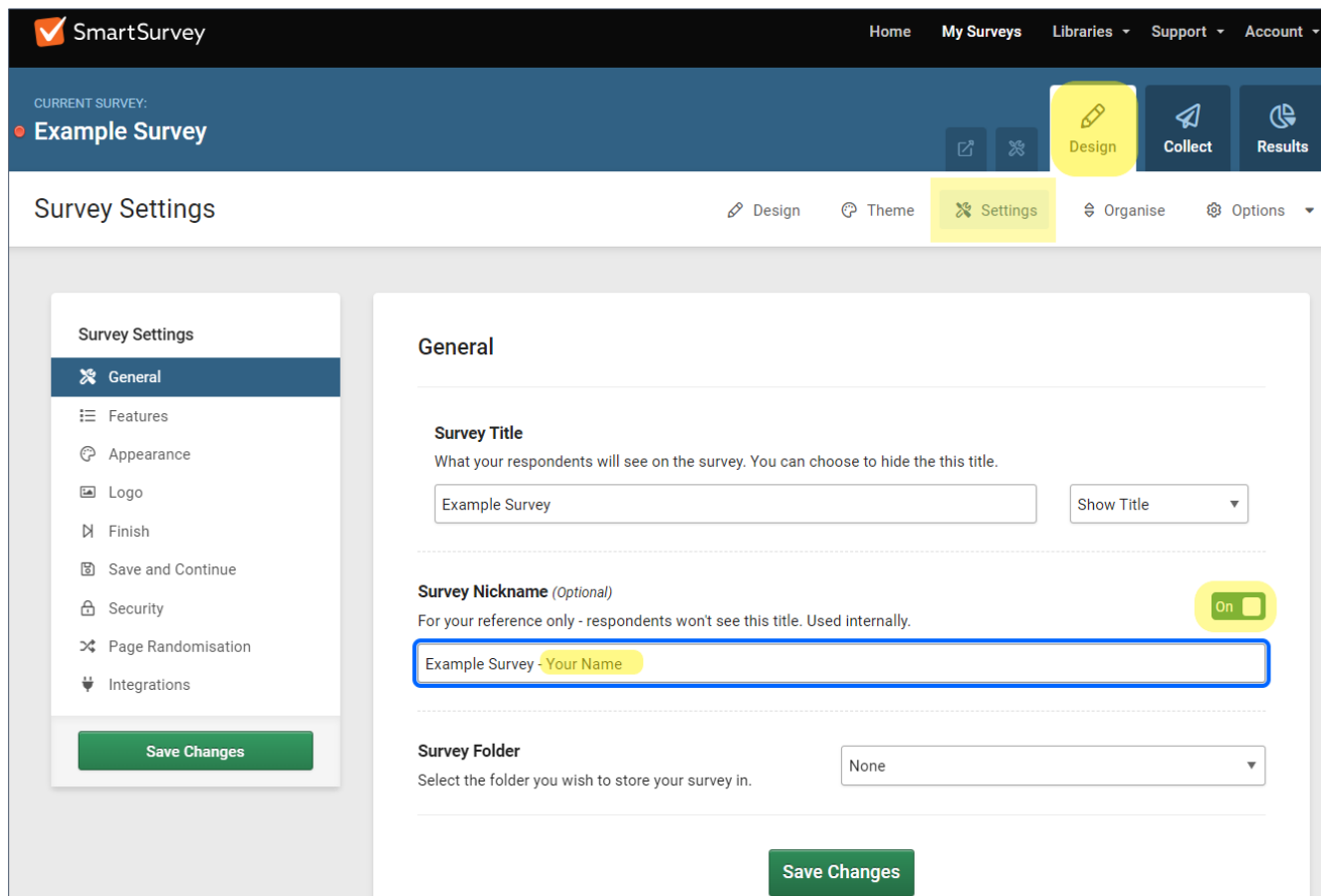
Scope

This SOP applies to anyone who has access to the SmartSurvey™ web application.

Core Requirements/Procedure

All surveys created on SmartSurvey™ must have a designated owner, and this must be identifiable upon login to the system.

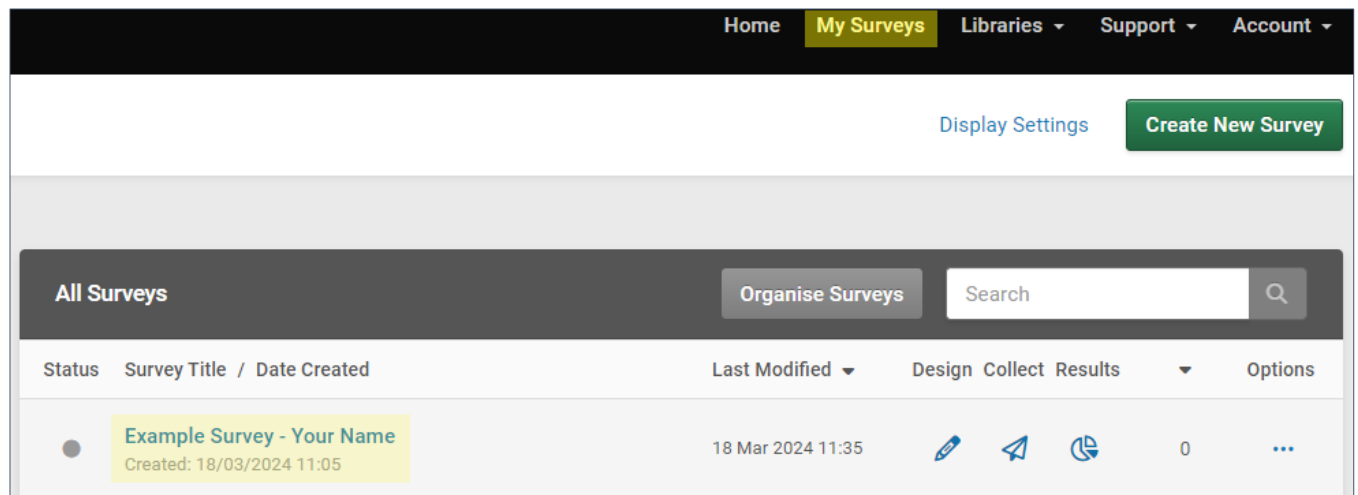
The image below shows how to make a survey's owner easily identifiable. This will not affect how respondents will see the title of the survey. It is for reference only.



The screenshot shows the 'Survey Settings' interface for a survey titled 'Example Survey'. The 'General' settings tab is active. The 'Survey Title' field is set to 'Example Survey' with a 'Show Title' dropdown. The 'Survey Nickname' field is highlighted with a blue border and contains 'Example Survey - Your Name', with a yellow highlight on '- Your Name'. The 'Survey Nickname' toggle is turned 'On'. The 'Survey Folder' dropdown is set to 'None'. A 'Save Changes' button is located at the bottom right of the settings area.

How to make a survey identifiable to an owner

The image below illustrates how the survey looks to a Smart Survey™ user. Note that it is now easy to identify the owner of the survey.



Survey displaying the designated owner

The owner of the survey should be accountable for:

- Ensuring that the survey complies with organisational standards and the Data Protection (Jersey) Law 2018.
- Monitoring the progress of the survey, including the collection of responses and any necessary follow-up actions.
- Storage of the survey response data.
- Regularly reviewing the survey content to ensure its relevance, necessity and accuracy.
- Communicating with stakeholders regarding the purpose, progress, and outcomes of the survey.
- Making decisions about the lifecycle of the survey, including whether to archive or delete it upon completion.
- Transfer of ownership should there be a need to do so (e.g., due to personnel changes or reorganisation).
- Data analysis. (the Information Governance & Governance teams may be able to assist)
- Deletion or archiving of the survey and its data whenever appropriate.

Deleting Surveys

When a survey has been deleted from SmartSurvey™, this process cannot be undone, therefore caution must be exercised when deleting surveys.

On the SmartSurvey™ Home page, select “My Surveys” from the main menu

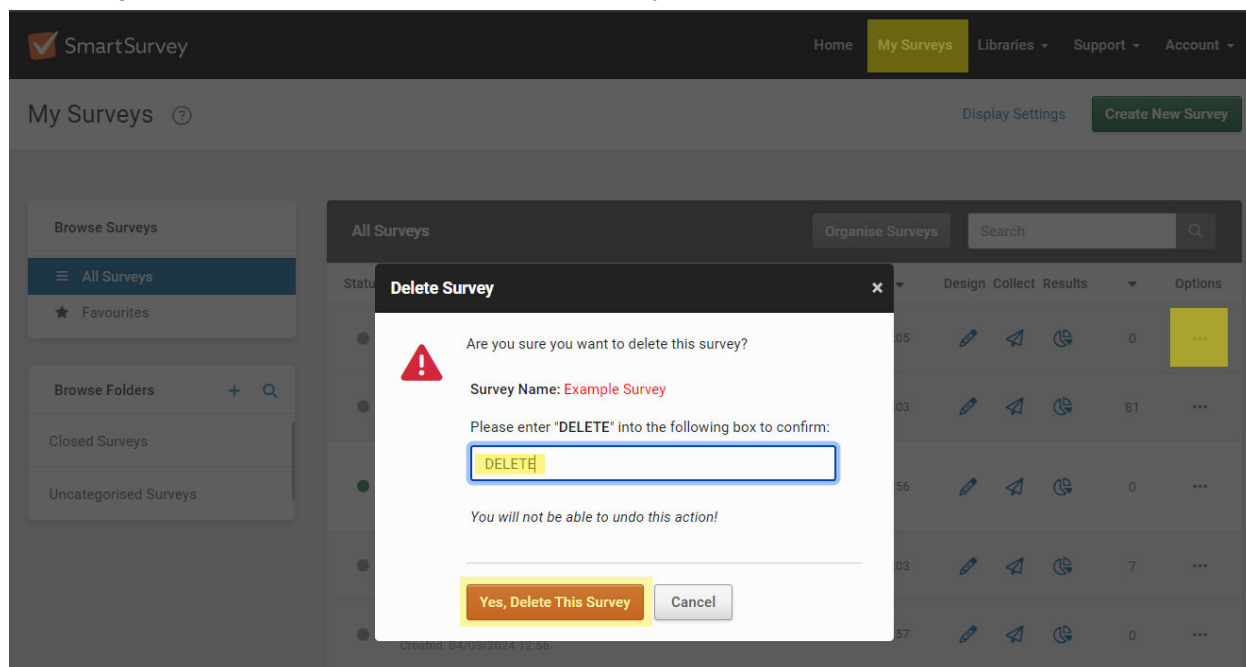
Step one directs the user to a page displaying all surveys held by FNHC

Find the survey that needs to be deleted, and click on the three dots icon, under the column headed “options”

A list of options become available to the user, click on “Delete Survey”

Upon clicking “Delete Survey”, a box appears, asking the user to type the word “DELETE” and click to confirm deletion of the survey.

The image below illustrates how to delete a survey.



Deleting a survey