

Creating Instruments

A. Overview. Instruments provide the means of collecting data. Instruments include RGB WorkStyle Preference Inventories, Workforce Surveys, Multi-source Feedback, Metric Evaluations and a host of similar documents. All survey-based instruments can be created using *CapacityWare*TM as long as five simple rules are followed:

- ? Each instrument can contain no less than ten and not more than 100 items.
- ? At least one item must be linked to each of ten categories.
- ? All items must be framed in a positive tone.
- ? All items must be easily understood simple sentences.
- ? The 0 to 9 scale must be consistently used for scaled items.

Note. Style Inventories cannot be created at the client-level using *CapacityWare*TM.

B. New Survey. Creating a new survey is easy. From the Main Menu "click" Instruments, then New Survey. The following screen will be presented. If a known category is available to narrow the potential pool of survey items, use the "Filter By" pull down menu to select the category and "click" Apply Filter. Do not use this option once item selection has begun.

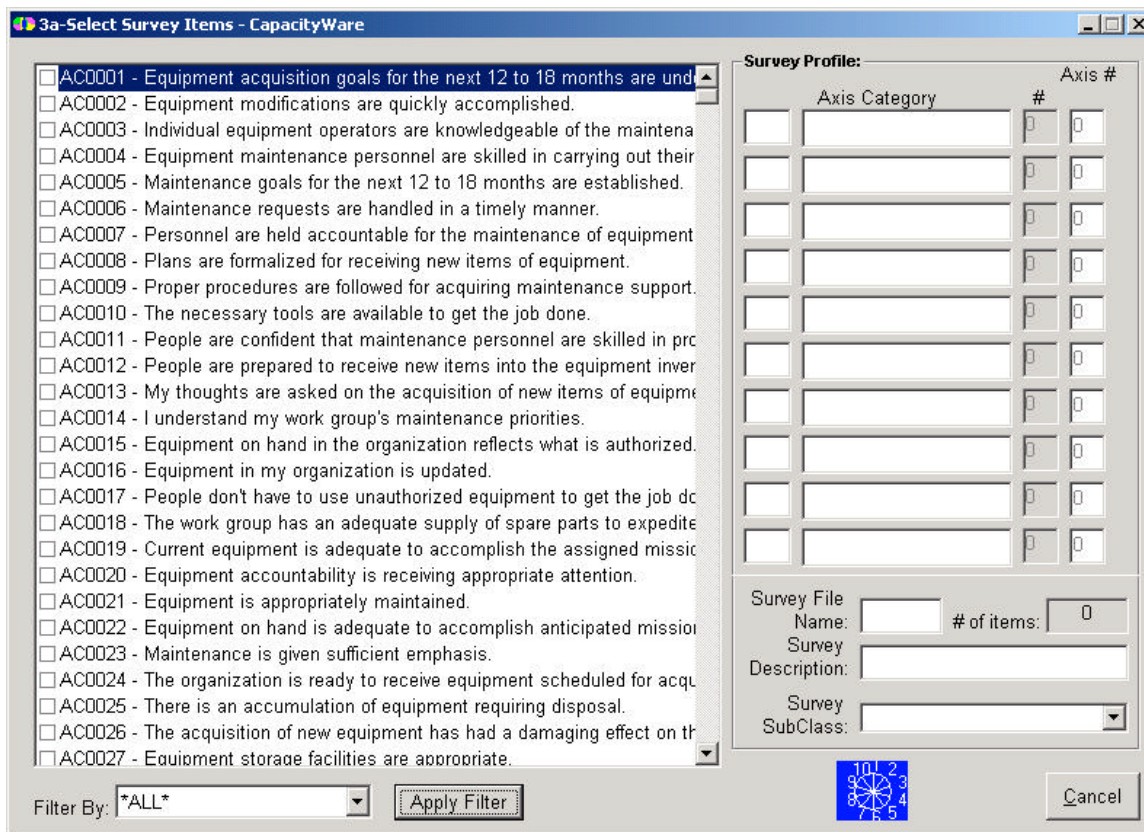


Figure 1.

1. Initial Item Selection. Over 1,000 survey items are available in the window to the left of the screen. A survey item is "selected" by "clicking" over the "check box" at the left of the item. If the wording isn't exactly what you desire for the final survey, this is easily correctable during the editing process (explained below). As the item is selected, notice that the category, axis, and the quantity of items in that category will automatically change. Remember to choose at least one item in each category. The methodology is used to assure a systemic data collection effort.

a. Closest Possible Item. Be careful to select the item closest to your desired final item wording. Editing the items may cause the item to be listed in the wrong category. The ten essential systemic categories are:

AC - Equipment

AS - Alignment - defines individual fit in the vision.

ES - Environment

IN - Information Flow

LA - Facilities

LM - Leadership and Management

OR - Organization Structure

PE - People

SK - Skills

TE - Technology (written guidance)

b. Item Category Integrity. Since survey item numbers are assigned based on the sequence of items on the final survey, the only consistent identifier from one survey to the next for a specific item is the Categorized Item Identifier (for example "AC0127"). The integrity of this multi-use identifier must be maintained.

c. Generic Terms. The Item Pool contains generic terms like "organization" or "work group" that are easily changed during the editing process. During initial item selection do not be concerned that the item is not exactly what you want it to be; tailoring can be achieved during the editing step. The idea is not to select a far out item then totally reword it during editing.

d. Wild Card Items. The system contains an ample number of "wild card" items that can be edited to any desired wording. The important thing to remember is the category into which the items must eventually fit.

2. Category Labels. The label to be used when displaying the category can be changed by placing the cursor in the category box and typing the new label, as you'd like it to appear on the display. This is not the only means to change the category labels, so don't be overly concerned about getting the right label at this time.

3. Survey File Name. Use a single set of descriptive letters to define the file name for this survey. Do not use other than a single string of letters and/or numbers.

4. Survey Description. Use any narrative description desired to distinguish this survey from others. It is recommended that the year the survey will be taken be included in this text.

5. Survey Subclass. Using the pull down window select a sub-class for this survey by "clicking" on the phrase that best describes the subclass into which this survey will be identifiable.

Caution. DO NOT "take" the survey prior to the editing process.

C. Edit Survey. Editing can only occur after survey creation and before the survey is taken. Once taken, the system will lock out any further editing of the survey. If a printed copy of the survey item shell is desired before the editing process - from the main menu "click" Select Instrument Action Button, "single click" on the survey you desire to print, File, then Print Word Doc. The system will pass the information to MS Word for printing. To edit, select the survey to be edited at the Main Menu - "click" Select Instrument, "double click" the survey. This will return you to the Main Menu with the survey name and description shown in the middle panel. "Click" Instruments, then "click" Edit Survey. The following screen will be presented.

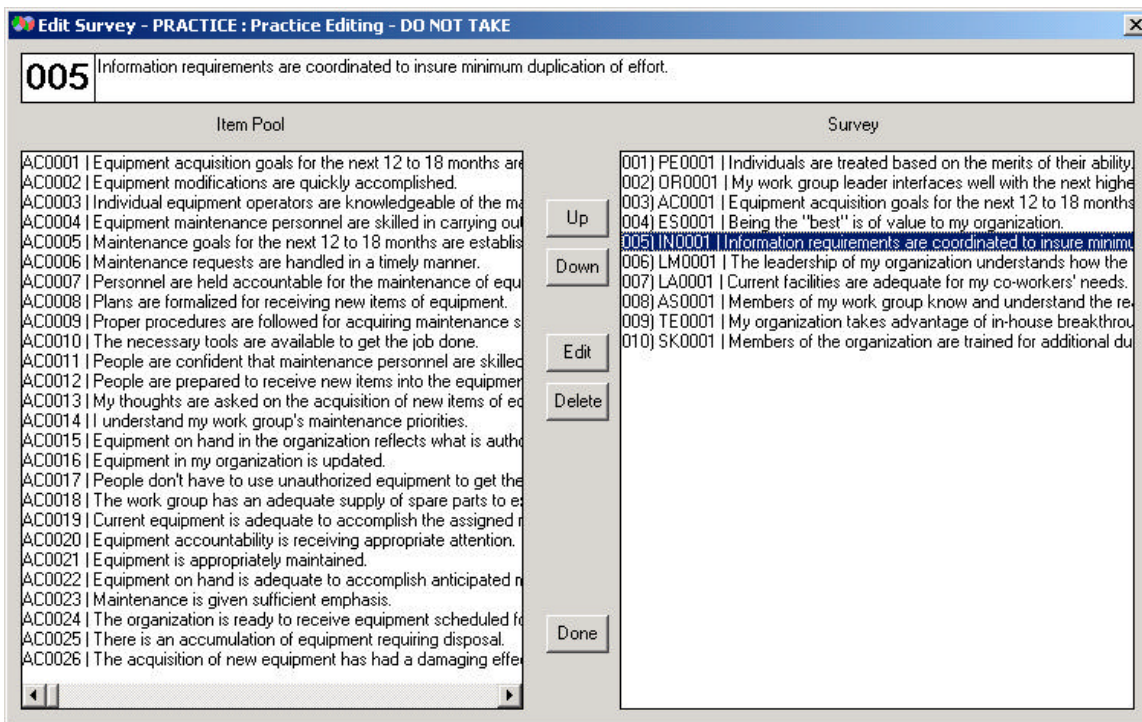


Figure 2.

1. Item Word Editing Window. Word changes are performed in the top window only. To select an item for word changes, highlight the item from the Survey (right) window by "clicking" on the item. The item will be displayed in the Item Word Editing Window at the top of the screen. Place the cursor in the window and edit the item. Be sure to keep the wording in

line with the item category. When editing is complete, "click" the Action Button Edit in the center column.

2. Deleting a Survey Item. Select the Item to be deleted from the Survey window and "click" Delete in the center column. The item will be removed from the survey.

3. Adding an Item. To add an item to the survey from the Item Pool, locate the item using the slider bar at the bottom of the Item Pool window and "click" on the item to be added. Note that some "wild card" items are included in each category that contain only the word "Edit" and can be made into any desired item as long as it maintains item rule integrity. Complete the action by "clicking" Add in the center column.

4. Done. When all actions have been completed, "click" Done in the center column.

D. Create Tailored UHS Labels. A tailored UHS Label set can be changed at any time from the Main Menu. Do not perform this function unless it is absolutely necessary. "Click" Edit, select Database, then Edit Axis Preferences. Acknowledge the warning screen.

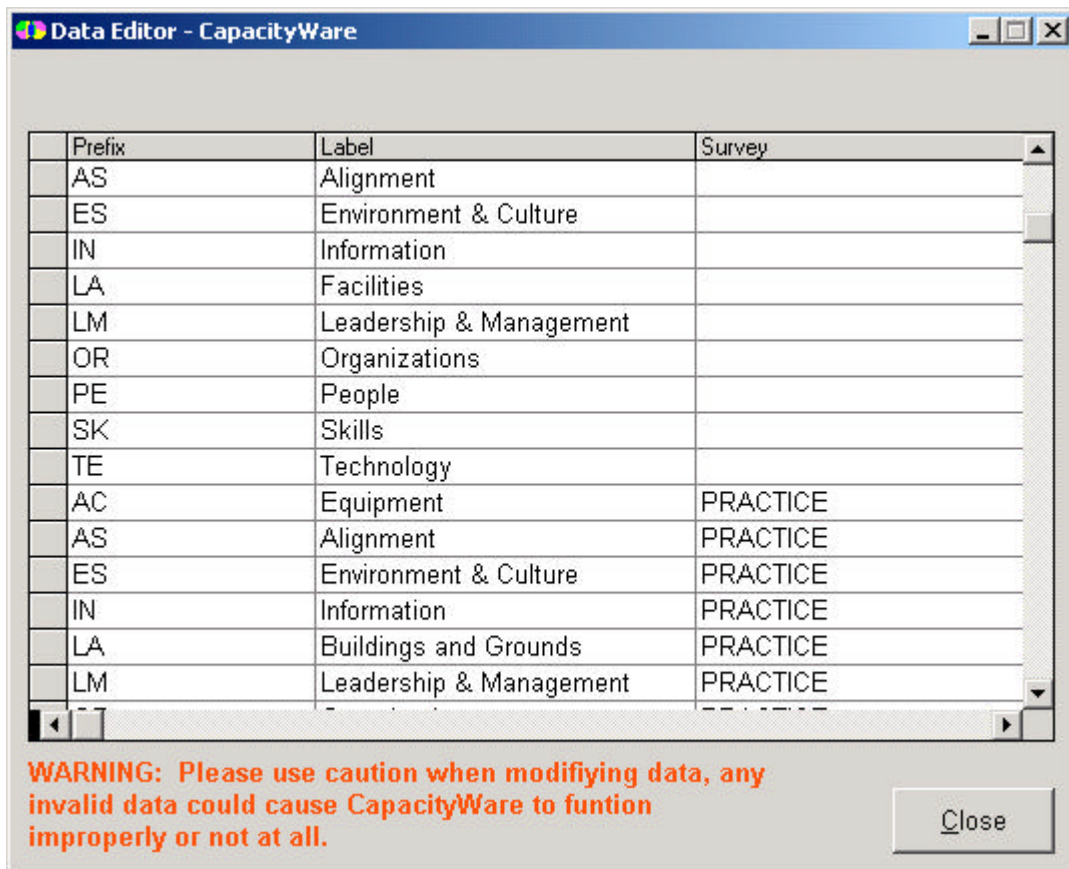


Figure 3.

Place the cursor in the Label column adjacent **ONLY** to the UHS label you desire to change and edit the wording. Note in the illustration, that the "LA" category label has been changed from the default of "Facilities" to "Buildings and Grounds" for the PRACTICE survey only. **DO NOT** change the default labels for any category or any survey created by someone else. Only change the labels for one specific survey at a time. "Click" Close to return to the Main Menu.

E. End Comments. Most surveys have open-ended questions at the end of the survey. To create these items, from the Main Menu "click: Instruments, then End Comments, then Add Question. The following screen presents itself.

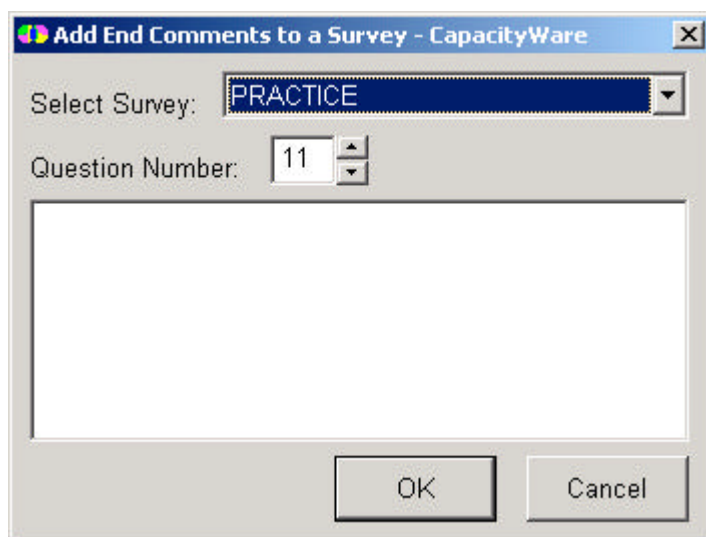


Figure 4.

- 1. Select Survey.** Select the appropriate survey from the pull down Menu, *CapacityWare*TM will automatically give you the next sequential item number.
- 2. Create Open-ended Question.** Place the cursor in the open window and type the desired open-ended question.
- 3. OK.** Completes the action. The Open-ended Question is now appended to the survey.
- 4. Cancel.** "Click" Cancel to end this operation without changing the survey.

E. Preparing the Survey for Reproduction. The user designs the final survey "product." *CapacityWare*TM makes it easy by passing all the necessary information to an MS Word Document for final editing. Under "ideal" conditions, respondents will not require the use of a "hard copy" survey, and will be able to respond electronically. In most cases, however, hard copy survey production will continue to be essential. Most surveys also have a cover letter

signed by the top executive in the organization. By partnering with *QWLC* Business Reply Envelopes and Internet response capability are also available.

1. Printing. To print the survey item shell - from the main menu "click" Select Instrument Action Button, "single click" on the survey you desire to print, File, then Print Word Doc. The system will pass the information to MS Word for printing. Once the survey is in a Word Document, the user can then add a Title, Demographic options, and survey instructions to complete the process.

2. Demographics. Remember, demographics are a function of "Respondent Data," not a function of the survey. If adjustments are required for a survey, they must be reflected in the Respondent Record and demographic options.

F. Summary. Data collection normally translates to a survey for most people. Surveys can be used for a variety of data collection requirements. By appropriately comparing data collection results from one data collection Event to the next, and tracking results over time, decision-makers can learn how to improve capacity in those areas for which they have prime responsibility. Creating data collection instrumentation using the *CapacityWare*TM system puts the meaning of "survey" into a new class of decision-making tools that are highly tailored by the client organization to meet specific needs.

1. Maintain the Integrity of the "System." Use the system AND follow the five simple rules set out in the first paragraph of this document. Use the system in ways for which it was intended - to collect data that improves decision-making and the quality of worklife for all members of the workforce.

2. Expand the Use of Surveys as a Means of Data Collection. Use the system for Leadership Training, Multi-source Feedback (360⁰ Feedback), Project Metrics to help assess project status, Return-on-Investment considerations, and for a myriad of other "need to know" tasks. Track Activity toward goals.

3. Link Data Collection with Remediation Strategies. Use the system to help people at all levels to learn what they need to know to be more productive by giving the feedback on the status of their domain. Develop corrective strategies and actions that lever the power of "if this than that" simplicity.

4. Integrate *CapacityWare*TM into Decision-making Routines. *CapacityWare*TM makes or saves resources for the organization as much if not more than any other information system because it targets the capacity development or recovery of the most expensive asset an organization has - its people. Present reports and other results at regular staff meetings to demonstrate its value-adding capability.