Guidelines for questionnaire application

Family and work balance during COVID-19

International Labour Organization

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Gender equality means good business

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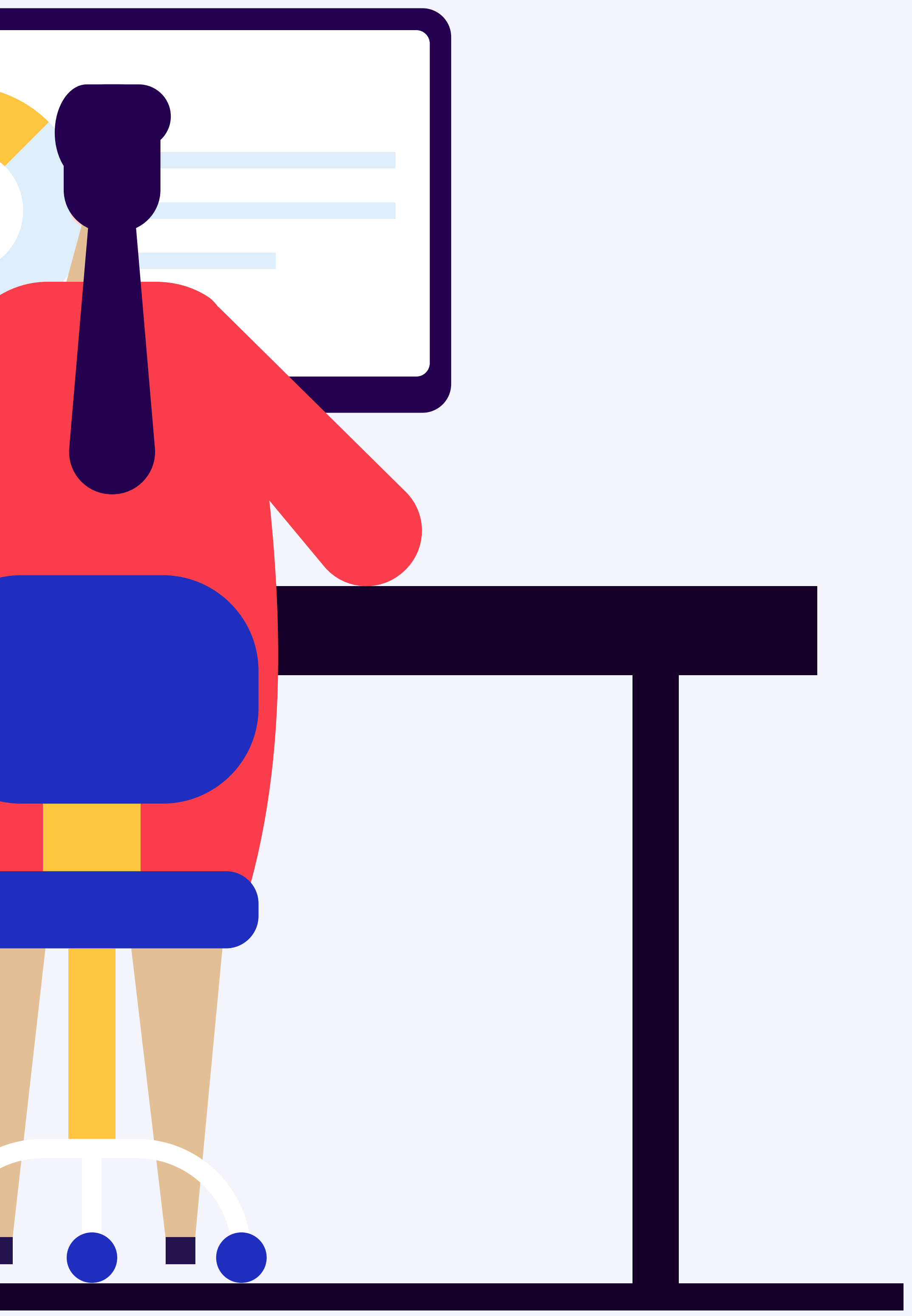

A About this guide

Objectives of this guide

The general objective for this document is to aid employer organizations in the application and interpretation of the questionnaire titled, “Measuring COVID-19 Impact on Family, Personal Life, and Work Balance for Working Persons,” and to complement the recommendations and best practices compiled by the ILO.

This guide does not constitute a detailed resource on research methodologies but rather works to provide the necessary knowledge and understanding to easily manage the information collected within the questionnaire.

Target audience

The target audience for this guide and its questionnaire are employer organizations of any size and from any industry.

This instrument may be applied by the areas responsible of managing well-being, occupational health, and organizational climate, such as Human Resources; Occupational Health Committees; Health, Safety and Environment Departments; Sustainability; and leadership teams, which may benefit from information shared by workers, in order to implement concrete actions that favor a better balance between work, family, and personal responsibilities improving work commitment and performance.

Questionnaire objetives

1. Provide a diagnostic tool that allows companies to better understand the type and level of impact that the COVID-19 pandemic has exerted on their workers work and personal environments, and which has a direct impact on an organization’s productivity.
2. Motivate companies to design solutions that support worker’s work-life balance, and improve current support iniciatives

Benefits of applying this questionnaire

- ✓ Understand the COVID-19 pandemic factors that directly affect their workers productivity and performance.
- ✓ Categorize the pandemic’s impact on population groups, for better decision-making and action implementation.
- ✓ Verify the effectiveness of the company’s available resources, to support the population within the context of the COVID-19 pandemic.
- ✓ Identify solutions to meet the working population’s needs, while also meeting business expectations.

Questionnaire sections and indicators

The questionnaire is divided into sections, as follows:

1. Demographic data
2. Impact of responsibilities on people
3. Care work
4. Time invested in responsibilities
5. Access to support resources
6. Access to outside-of-work support resources
7. Exploring other support options

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The relevance of each section, and the indicators used, is presented in the following table:

Table 1 Components, indicators, and relevance

Components	Indicators	Relevance
Demographic data (8 items)	1 Relevant to the Job: position, type of contract, type of work, seniority, location, staff in charge 2 General: gender and age	Demographic data allows for information segmentation to facilitate and improve precision for work analysis, the definition of findings and, consequently, decision-making. This exercise ultimately results in more focused action plans and more effectively channeled resources. In a survey like this, demographics should be limited to information that is relevant to the organization.
Impact on the individual (4 questions)	1 Impact on performance of additional caregiving responsibilities 2 Impact on family and work relationships 3 Emotional impact on the individual 4 Impact on overall job satisfaction	In the 2018 study, "Care Work and Care Workers for a Future with Decent Work" the ILO noted that, "changes in family structures and aging societies point to an increase in the number of both women and men who will face a potential conflict between unpaid care work and paid employment." The COVID-19 pandemic is an additional factor that has forced more people to combine their work responsibilities with family and domestic responsibilities, almost simultaneously, as they work from home. These changes are a challenge in reconciling responsibilities and constitute an issue that must be observed and addressed through policies and behaviors that support and promote gender equality and offer options to make that reconciliation easier. Knowing how care responsibilities affect workers will allow employer organizations to better understand the areas and issues in which their policies and benefits can have the greatest impact.
Care work (5 questions)	1 Direct, personal, and relational care activities (feeding a baby, caring for a sick partner, caring for an older adult, caring for children aged 0-5, among others). 2 Indirect care activities, such as cooking, cleaning, regular shopping.	The ILO care work study mentioned above defines care work as two types of overlapping activities: direct care activities and indirect care activities. Both types of activities can be made invisible or ignored to the detriment of the person who performs them and the productivity of the organization in which they work. The low visibility of unpaid care activities impacts the way in which people's work and performance is perceived and particularly affects women, who are usually the ones performing these activities today, COVID-19 pandemic isolation measures, have forced large portions of the population to work from home while attending care responsibilities. To understand how this personal impact affects the company, it is imperative to understand, via the survey, how workers combine these responsiibilities and what factors could have a stronger influence. For example, the ILO revealed in its study that the presence of children under 5 years of age in households considerably increases the impact of care work.

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Table 1 Components, indicators, and relevance

Components	Indicators	Relevance
Time invested in care work (2 questions)	1 Household and Care Responsibilities	This indicator is important in measuring the impact of the pandemic on the ability of workers to respond to work responsibilities in an appropriate manner. It also helps identify potential action areas for employer organizations to direct their support resources or adjust their policies, so that they generate greater impact.
Access to employer organization support resources (7 questions)	1 Policies and Benefits (flexibility, licenses, vacations, assistance programs, etc.) 2 Support from Headquarters	Monitoring an organization's policy and benefits effectiveness allows for better administration of those policies and benefits, and for more effective decision-making regarding the use of resources. This indicator will allow employer organizations to understand how workers perceive the resources they have at their disposal, as well as potential areas of focus.
Access to outside-of-work support resources (6 questions)	1 Other resources, people, or instances that the working population have access to, in relation to the direct care of dependents. 2 Additional resources or initiatives suggested by the employer.	This indicator facilitates the identification of other support resources available and that may complement, improve, or influence the resources currently offered.

B Recommendations for applying this questionnaire

This section offers a simple and practical process to apply the questionnaire, as well as recommendations to increase efficiency in the collection of information that will later bring companies and organizations closer to concrete and effective solutions in support of worker's balanced work-life responsibilities, especially in times of COVID-19.

The application of the questionnaire, Measuring COVID-19 Impact on Family, Personal Life, and Work Balance for Working Persons, is proposed via a four-step process:

In APPENDIX No. 1, Template for Questionnaire Application, included in this guide, you will find a format that summarizes the aspects relevant to carrying out the steps described here with greater clarity, practicality, and attention to detail.

Step 1: Definition

- Objectives
- Sample
- Questions
- Method of application

Step 2: Collection

- Schedule the exercise
- Identify and allocate resources
- Identify the team in charge
- Create a communication plan

Step 3: Results interpretation

- Organize the information
- Combine the data
- Analyze the results

Step 4: Results interpretation

- Discuss and prioritize
- Make plans

Step 1: Definition

The first step in this process consists in setting the objectives, the sample, the questions, and the way in which this information will be used. Being clear on these aspects will allow the company or organization to allocate its resources more efficiently.

Define the objectives:

A clear questionnaire objective facilitates decision-making in later stages of the process, such as communication, data interpretation, and subsequent actions, and provides guidance to interested parties in their understanding of where their efforts are directed and what to expect from the same.

A suggestion is to review the objectives described in this guide and adapt them to the context of the company or organization, by answering the following questions:

- ✓ Why is it important to fill out this questionnaire?
- ✓ What strategy or business need is this decision responding to?
- ✓ What exactly do you want to know or measure?
- ✓ How does the purpose of this survey relates to what is important to decision-makers in the company?
- ✓ Who in the organization's upper-level must be specifically committed to the objective, to ensure survey success?
- ✓ Who has the required knowledge to validate the survey's objective?

Define the sample:

Defining the sample consists of determining from whom the company wants and / or needs to collect the information. Similarly, it is important to consider what criteria will be used to decide whether to exclude any group from questionnaire application. Making those decisions on time helps create a transparent and clear process.

The questionnaire is designed to be applied to the entire workforce at a company or organization. Although the organization might consider applying it to just a subset, the suggestion is to do it this way, as it will give a broader and more complete perspective of reality.

The demographic section at the beginning of the questionnaire will allow segmenting the information, for better analysis and decision-making once the information is available; however, it can also be used to define the sample. The following questions can help in this step of the process:

- ✓ What locations fall within the scope of this survey exercise? (when there are several locations)
- ✓ What hierarchical levels?
- ✓ Are new hires participating? It is important to define the minimum time that a person must have with the organization to offer information relevant to the survey's objective.
- ✓ Will you include participation from workers who are planning to leave the organization in the short term?
- ✓ Should people with temporary contracts or internships participate?

A well-defined sample is the basis for coordinating all other aspects of the exercise, from the questions' choice and the communication and deployment plan, to the scope of the action plans. With a clearly defined sample, survey managers must ensure that they have complete and up-to-date contact information, in order to reach the entire sample in an adequate and timely manner.

Define the questions

The questionnaire consists of 29 questions that cover the components described in Table 1: Components, Indicators, and Justification of the Questionnaire.

Although questionnaire completion is recommended, companies and organizations can choose to rule out demographics or questions according to objectives and specific interests. The recommendation is to use the questions that best fit the organization's reality and that most favor the achievement of its objectives. In the same way, companies can propose other questions or add demographic aspects that they consider relevant and that are not included in this questionnaire. For example, the company can determine, as part of its objectives, to measure the results and segment them by function or department, and in this way include a role demographic in the initial section.

The questions in the questionnaire are mostly closed, so that it is easier to answer them and later organize the information for analysis. In a few cases, the survey questionnaire includes optional open-answer items that participants can voluntarily answer to complement their responses.

If the organization wishes to include additional questions in the questionnaire, the suggestion is to consider the following recommendations:

- ✓ Always consider the survey's purpose when constructing the question and ask it from the perspective of the respondent. Questions that are not directly related to the survey's objective can detract from its results and distract or confuse participants.
- ✓ One way to verify that you have both sufficient and accurate questions for the questionnaire is to create, in advance, the results tables that you would like to display upon finalizing the process. By thinking about what the final results would look like, it is possible to conclude whether the current questions are sufficient or if it is necessary to include any additional.
- ✓ State the questions in clear and simple language, so that it is easier for participants to respond.
- ✓ Avoid questions that refer to specific dates and times. This can limit the accuracy of answers. If these types of questions are necessary, save them for the end so that they are answered without affecting any answers to other questions.
- ✓ Always consider including the option "I prefer not to answer" in your questions. This option gives respondents the ability to abstain from responding when they are uncomfortable, and thus reduces the possibility of biasing their responses with inaccurate answers given only because they feel compelled to respond.

Method:

This refers to the way in which the survey questionnaire will be managed. Questionnaires can be applied using a personal or virtual interview or via self-administered means (printed questionnaire and answered either manually or digitally). Defining, from the beginning, the preferred method to run the questionnaire will provide greater focus for your planning tasks and will avoid last-minute changes.

Organizations can choose questions according to objectives and specific interests.

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Table 2 describes both the advantages and the considerations to take into account for each of the methods.

Table 2 **Channels, advantages, and considerations**

Method	Advantages	Considerations
Interviews (Personal or virtual)	✓ Provides a personalized space for people to elaborate on this Guide's Objectives and clarify any questions on the spot. ✓ More direct access to information and examples to cover the questionnaire. ✓ Reaches populations with accessibility limitations (disabilities, illiteracy, etc.)	✓ Time invested is proportional to the size of the organization. ✓ It can be more difficult to schedule time for interviews. ✓ There must be a bond of trust between the person interviewing and the person responding; otherwise, access to information may be limited. ✓ Sacrifice anonymity and decrease confidentiality.
Self-Administered (manual or online)	✓ Flexibility in response, according to availability ✓ May be done via a digital tool, in which the process of completing a questionnaire is more intuitive. ✓ Low-cost or free design (SurveyMonkey, Swatooht, Surveycate, Typeform, Google Forms) ✓ A manual, physical format is an option for those who do not have email or access to a computer.	✓ Questionnaire information must be clear and concise. ✓ For a physical format (paper), consider page layout (font size, print sharpness, etc.) to facilitate both reading and providing information. ✓ It is important to take into account the way in which answered and archived questionnaires will be handled, to ensure confidentiality and information security.

Step 2: Collection

Information collection is part of this preparation, which is a fundamental step in guaranteeing that the collected information best reflects tworkers reality. Preparation consists of ensuring, prior to questionnaire application, that all details are covered within sufficient time. This is why the suggestion is to develop a timeline, in order to make certain forecasts based on criteria, such as:

- By what date is the information needed? Is it needed as part of a deadline to implement an organization's strategy or commitment?
- What is the best date to contact participants and conduct the survey?
- What other work priorities might interfere with sending the questionnaire and collecting and analyzing the information?

These final two points refer to self-imposed timelines within companies or organizations that have regular cycles, such as closures, production, etc. Defining dates that do not interfere with those cycles favors the company and the survey's objective.

- Who must approve the questionnaire? How long could questionnaire approval take?
- How long will the survey be open? Regular cycles should be considered, as should other circumstances that affect the regular course of work – holidays, special activities, weekends, etc. – in order to determine a reasonable timeline for information collection.
- How long before implementation will communication and participation recruitment take place? How often will this messaging be reinforced?

Answers to these questions will allow the company to plan a realistic timeline.

Other important aspects to consider, as part of planning, are resources for questionnaire execution, survey method, and communication, as discussed below.

Resources:

Resources are understood as the team of people who will support and facilitate the survey process, the time required for design, and the budget. Success will depend on both the quality and early coordination of these resources. These are just some questions that must be answered during this step in the process:

- Who are the most suitable people or areas to head survey implementation? Do those areas or people agree to take on this responsibility?
- What budget does the exercise require?
- Who must approve the budget?
- How will decisions be made on how to use the budget?
- How will the questionnaire be validated? A pilot program will be implemented?
- What other design elements should be addressed? Consider any promotional elements and/or printed brochures, if necessary.

Communication:

The best way to ensure broad survey participation is communication planning; for this reason, it is important to take into account any relevant aspects, such as invitations and language used, as well as to be clear about how participants' privacy and confidentiality will be guaranteed.

Invitations:

It is essential to select the means by which invitations to participate will be sent, as well as to define the messaging to be communicated throughout the process and to establish a communications calendar that includes how far in advance and at what time each communication should be sent. The channel for sending communications should be determined based on the organization's customs and practices, which will already be familiar to the audience. Some common options include email, posters in common areas, or physical mail, for organizations whose workers don't have access to digital media, etc.

Messaging:

Messaging must be clear and should contain all information that participants must know in order to successfully complete the survey exercise. Some suggested components for messages are:

- the survey's objectives
- the period in which the survey will take place
- how the collected information will be handled
- how to access the questionnaire
- how results will be disclosed
- who is responsible for handling questions
- how confidentiality is ensured
- Etc.

Other suggestions:

In advance, send out a communication to all team leaders, area leaders, Human Resources teams, and other relevant areas, to inform them of the general plan and company expectations regarding how they can provide support in survey dissemination and promotion.

Regular communications throughout the time the survey is active.

Share a thank you note after participation, as a sign that the organization values worker contributions and as motivation for people to participate in future surveys.

Information management:

Given that the collected information is of a personal nature and, in some cases, sensitive, it is important to encourage and ensure confidence in its handling. Communicating this in advance can provide a safe space to facilitate collaboration from participants.

Considerations on information management:

- ✓ **Purpose of the Information:** It is very important to clearly indicate the way in which any information obtained will be used. The organization must ensure that the information provided will be used only for the purposes originally defined and must specify the mechanisms to deliver on that promise.
- ✓ **Anonymity and Confidentiality:** It should be clear to questionnaire participants that their responses will be confidential and, if they have the option to choose, anonymous. Confidentiality and anonymity strengthen the security and trust of those who respond.
- ✓ **Parties Responsible for the Information:** It is also important to consider that access to survey data should be limited only to the people involved in data analysis. The organization can define, in advance, who will have access to the information and how they should protect it. These analysts should consolidate the main findings in summary reports and graphs that other interested parties can access at a later date. The execution of this point could require legal advice or compliance regarding information security measures.
- ✓ **Informed Consent:** Anyone who participates in the questionnaire and provides personal information must do so voluntarily. Obtaining informed consent refers to informing participants about the survey (objectives, benefits of participation, use of information) and then allowing them to provide consent on whether they would like to participate (or not). A suggestion is to include a contact channel for possible participants to address any questions or concerns. In APPENDIX No. 2: Informed Consent, an example is provided that can be adapted according to the organization's needs.

Response rate

There are many positions on what constitutes acceptable response levels for various types of surveys. In the case of worker surveys, Table 3 draws a relationship between the sample size and the ideal levels of participation.

Table 3 Ideal participation rates in employee surveys

Size of the organization	Ideal rate of participation
<50	80-90%
500+	70-80%
1000+	65-80%

Step 3: Results interpretation

Interpreting results and preparing reports encompasses the raison d'être of the present diagnostic process, with which organizations and companies, in accordance with the objectives established at the beginning, will understand worker's situation, in order to implement timely solutions.

The suggested steps are:

1. Organize the data

A consolidation process must be established prior to receiving the data; this must be both known and understood by the people who will handle this information.

This questionnaire offers questions on a Likert scale, which can be converted to a numerical scale to facilitate analysis. For example, a scale of "very satisfied", "satisfied", "neutral", "dissatisfied" and "very dissatisfied" can become a scale of 1 to 5 where 1 is equivalent to "very dissatisfied" and 5 is equivalent to "very satisfied." Data organization should result in a single document that consolidates all survey data, in a standard way.

To analyze open or free text questions, text analysis tools, such as Online-Utility (https://www.online-utility.org/text/analyzer.jsp) or WordCloud (https://www.wordclouds.com), may be used. These help to identify the most frequent topics and ideas pulled from survey answers. In the absence of access to digital tools, responses can be copied onto paper cards and manually grouped by topic or idea.

2. Combine data

In order to better direct company actions and the use of time and resources, it is important to analyze data on various levels. A common way to organize data is to relate demographics to specific indicators (See Table # 1). These data crossovers will make it easier to identify the most notable topics or indicators, as well as the areas of the organization in which those topics resonate most strongly, either because their impact is very positive or because they demonstrate an opportunity for improvement.

The cuts in results can be as general or as specific as you'd like; however, the recommendation is to move beyond the macro level, so as not to create generalizations that could lead to less focused and less effective investments. The decision of how to combine data should be made only after considering the objectives that were raised in Step 1.

Below are some possible data combinations that organizations using this tool can consider when carrying out their own analysis:

3. Analysis

General analysis

This first approach involves data from the entire organization, segmented by demographic aspects or by indicator topics. At this collective level, information exploration is conducted to garner an idea of what the responses reflect, in general, as well as the primarily identified topics and trends, without targeting specific segments.

Entire organization

- By business unit
- By work position
- By gender
- By hierarchical level

Specific analysis

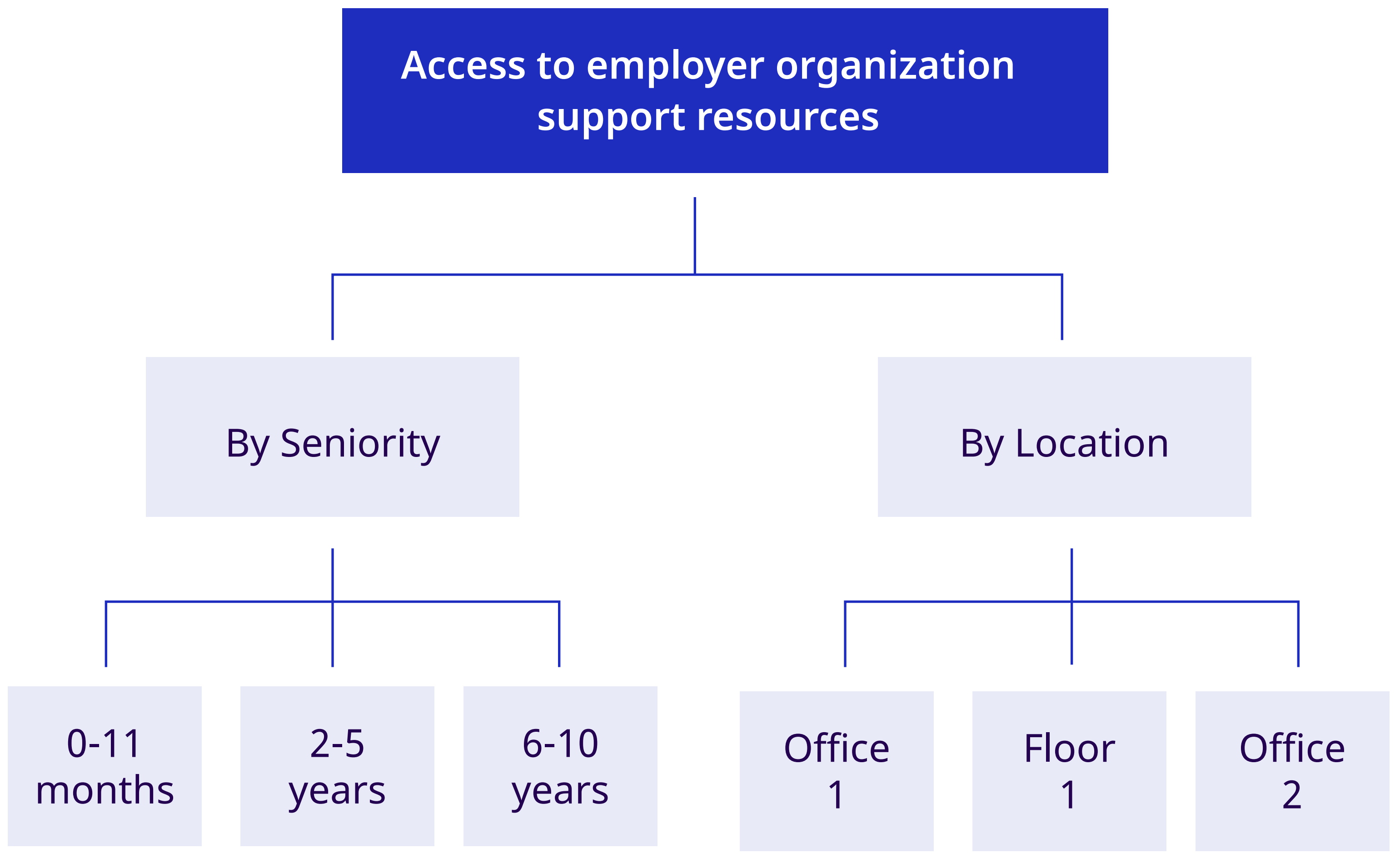
At the second level of analysis, it is possible to observe and, more specifically, relate incidents in specific groups, in order to reach more precise conclusions. For example, if at the macro level, access to employer-offered support resources was identified as an issue of opportunity, at this level of analysis, it is possible to determine more precisely which of the available resources is accessed to a greater or lesser degree, and in which specific groups this issue has more or less impact. To conduct this analysis, indicator topics are reviewed on a question-by-question basis and by demographic aspects.

Entire organization

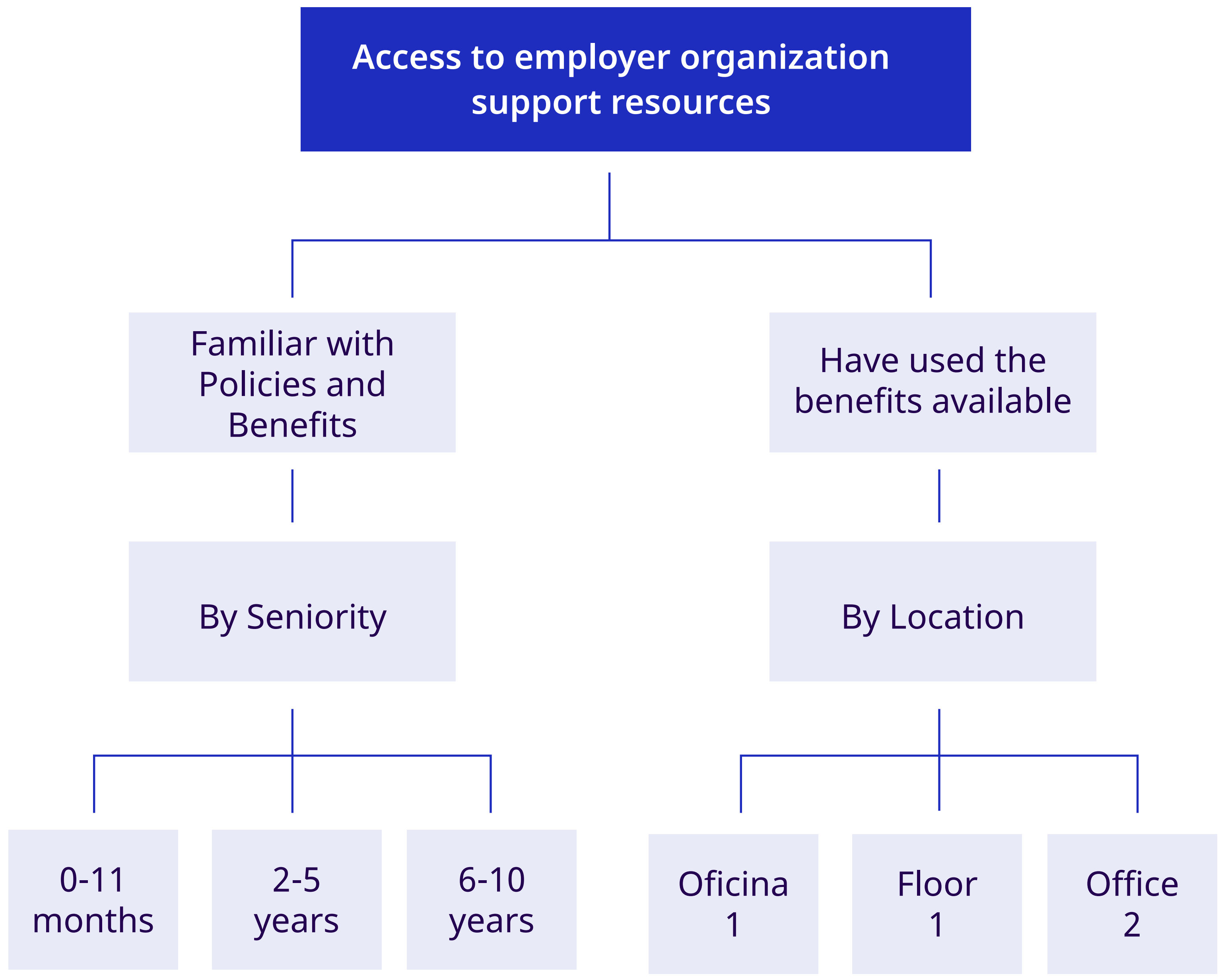
- Perceptions on policies and benefits
- Role in care work
- Use of balance resources
- General perceptions on support received

The examples below present two ways in which an indicator topics may be analyzed.

This way, it would be possible to know how responses are grouped in an indicator topic, according to age groups and location. For example, what is their level of seniority or where are they located, according to their level of access to the organization's support resources.



On a more detailed level, an indicator topic can be divided into its components (questions) and observe how responses are grouped according to demographic characteristics. For this particular example, it might be possible to understand whether there are specific seniority or location groups that require some type of intervention to ensure that they are aware of the policies and benefits available to them, and so that they take better advantage of what's available.



The degree to which the data is segmented will always be the organization's decision; the recommendation is to make the most of the information available, in favor of the objectives set.

To facilitate this analysis task, the recommendation is to prepare reports that support not only data review, but also communications of interest to the public (for example, human resources and / or sustainability teams, organization leaders, etc.).

This information should be presented in a way that helps the audience both interpret the results and understand the meaning of those results. The use of resources, such as tables and graphs, is recommended. The objective of these graphs should be to demonstrate contrasts trends in data, as well as patterns or trends. Bar and column charts are specifically suggested to demonstrate the difference between categories and groups. For each table or graph, a descriptive title is useful.

The final result of this step consists of a clear, objective, and balanced summary of findings, using as a reference both the indicators and the groups that showed the most relevant results, both in relation to positive aspects and strengths, as well as in relation to areas of opportunity and of potential intervention.

Other considerations for information analysis

Small groups

To protect participant confidentiality, do not share results when the respondent groups are small. Typically, information for groups of fewer than 10 answers is shared as aggregated data and not separately. In this case, the suggestion is to address the priorities, as interpreted from the data, and then to directly communicate the action plans.

Incomplete questionnaires

It is possible that, when organizing information, analysts discover that some questionnaires were not fully completed. The recommendation is to define, in advance, how these cases will be handled. This situation can be more easily controlled in digital surveys, by making all answers mandatory and simultaneously enabling the option, "I prefer not to answer."

Step 4: Actions and follow-up

The final step in the process is what makes possible to bridge the gaps between findings and aspirations. Upon reaching this stage, it is essential to understand findings and recommendations, in terms of the primary areas or topics of opportunity, as well as the specific workers' groups that require more attention.

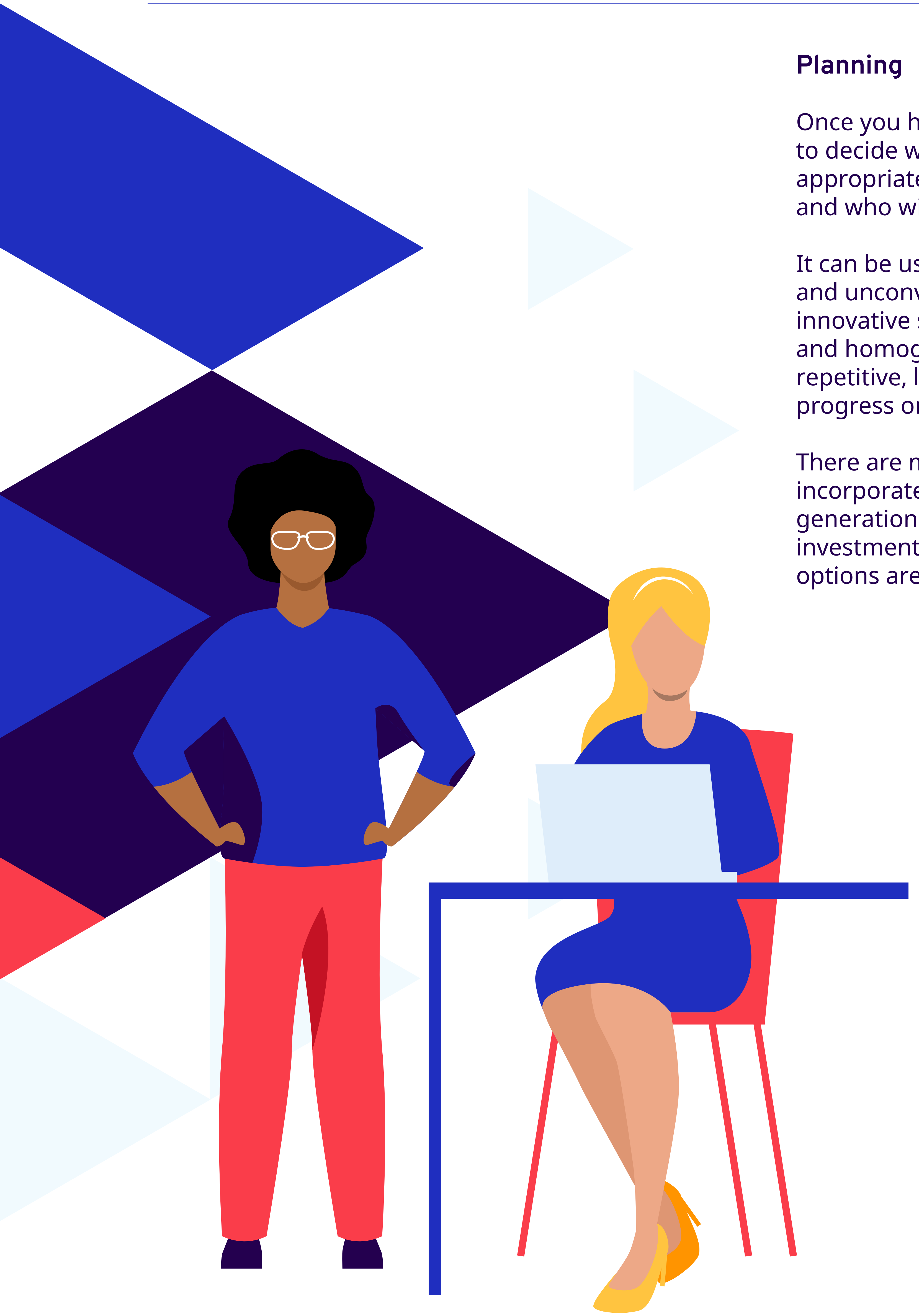
The following steps can make it easier to create a solid action plan.

Discuss and prioritize

Results review and discussion allows for the integration of various perspectives and aligns support to the most relevant issues. This involves convening all key interested parties to share the most important findings and involve them in the conversation. The goal of this conversation is to define the most relevant and highest priority topics to address in the action plan.

Here are some suggestions, to better support this conversation in a practical and effective way:

Map results	List the most relevant or repeated findings, data patterns, indicators, and topics.
Analzye potential causes	Review the initiatives that could have had a positive or negative impact on results, with the goal of finding potential causes and possible areas to reinforce or adjust. For example, changes in policies, new policies or benefits, changes in work modalities, changes in working hours, and wellness initiatives.
Link with strategies, act accordingly	Identify the topics that directly or indirectly impact the organization's strategies. For example, if productivity is a strategic issue and the survey reveals that employees consider that current working conditions have decreased their performance, it may be necessary to assess whether adjustments are required to the originally defined actions established to address productivity.
Prioritizetopics	This list of relevant issues can be prioritized according to criteria like expected impact, ease or speed of execution, urgency, etc., which enable definition of the issues that should be addressed first. There is no one-size-fits-all approach, so the organization will have to choose the one best suited to its needs and resources.
Choose topics for the action plan	The number of topics should be commensurate with the organization's ability to address them. It is preferable to direct focused work on a few topics, rather than superficially addressing many topics. Issues that are not addressed may be marked as pending and requiring future attention.



Planning

Once you have a list of confirmed issues, it is time to decide which interventions are most feasible and appropriate, how and when they will be carried out, and who will be in charge of these actions.

It can be useful to encourage both creativity and unconventional ideas, in order to design innovative solutions. Limiting this work to a small and homogeneous group of people could generate repetitive, less effective solutions that could slow the progress on the objectives.

There are many ways in which organizations can incorporate diverse perspectives into their idea generation. Several of these do not require a high investment of time or money. Three very easy options are mentioned next.

Approaches to idea generation:

Generate ideas from inside the organization	Convene diverse individuals and groups to suggest solutions to be implemented in the action plan; for example, representatives of identified priority groups; the occupational health committee; business medical professionals; personnel from the areas of health, safety, and environment; and staff from human resources (labor relations, compensation and benefits, training and development, etc.). **Integrating points of view from various people and influence levels will increase the reach and impact of your solutions.**
Connect externally	Connect with networks, partner organizations, related business groups, and other entities willing to share their experiences and best practices. Familiarity with outside experiences is a good way to inspire solutions that are tailored to the organization and, additionally, to deliver training to third parties, to serve as a guide in implementing the interventions themselves.
Consult technical sources	Extract creative ideas from technical and recognized sources that bring perspective and content to your solutions. The website conciliaciontraajofamilia.org offers access to all ILO resources on this topic.

Below is a non-exhaustive list of Best Practices that may be considered, according to obtained results and your company or organization's reality.

Additionally, consider previous efforts on similar topics, as well as their results, so as to avoid unintentional or unnecessary duplications.

Look for as many ideas as possible without evaluating or discarding anything initially (even those ideas that seem not to be sound); then, choose those that best respond to the organization's objectives and resources.

Topic	Best practices to consider
Flexibility	Implement flexible work arrangements (flexible hours and breaks, flexible locations / roles). This practice is recommended for those organizations or companies in which workers attend to additional care responsibilities, as this will provide support in achieving a better work-family balance while improving productivity. The organization can begin with a few options and integrate new ones, as changes are applied to the company or organizational culture.
Help and advice	Provide counseling and support in social and psychological terms, so that the working population can effectively balance work and family. This can be achieved through trained internal staff, worker assistance programs, or access to information from external assistance services. Seek a cultural change that promotes a healthier division of tasks, by providing information on the distribution of domestic and caregiving roles. Some ways to do this is to include outreach activities, parenting benefits, and support policies.
Support for caretakers	Provide information on the availability of care services, within the context of the COVID-19 pandemic, and consider a combination of support measures that respond to identified needs, which may include: on-site child care centers, child care in emergencies, subsidies for child and adolescent care, and eldercare centers. Allow the workers to take time off from work to attend to family care needs, such as leaves of absence additional to those contemplated in current legislation.
Support for caretakers communication and information	Ensure that all workers have both access and the right to support resources – and that they know, understand, and feel comfortable using them. Some methods for carrying out these practices are through an intranet page, resource catalog, and printed newsletters (for those workers who do not have access to a computer).

Finally, assign actions; identify responsible parties for plan execution and monitoring; define success indicators; and set timelines for task completion. The use of documentation templates will contribute to better information organization and will facilitate progress reviews.

In APPENDIX No.3: Action Plan - Post Survey of this document, you will find a template that serves as a basis for this task.

Follow-up

One time actions and isolated efforts do not create real change or sustainable solutions. Action plan success in any area depends on committing to follow-up on issues and measuring progress. It also entails the ability to distribute tasks between areas and managers, to make work more bearable in the midst of the organization’s other priorities.

Here is a practical sequence that includes three lines of action. The recommendation is to follow up on the action plans derived from this survey exercise.

Responsibility

Assign work to the areas and people who assume responsibility for their execution.

Identify a leader who will follow up on all work plans and facilitate their progress.

Execute action plans within defined timelines and terms.

Regularity

Be disciplined in establishing cycles to hold monitoring and progress meetings, to repeat the survey exercise, and to share progress with interested parties and decision-makers. It is recommended that progress reviews and communications be conducted at least once every three months and that the survey exercise be repeated as long as the objectives remain valid.

Measurement

Define clear progress and impact indicators.

Verify that plans continue to respond to strategic priorities and make adjustments, where appropriate.

Measure public perceptions and interest regarding plan progress and the relevance of its objectives.

Evaluate work from responsible leaders, as well as the connection with those leaders and satisfaction levels of the decision-makers.

C 3 Glossary

Anonymity
Confidential information is information that is kept private, although it is possible to identify who supplied it. By contrast, anonymous data cannot link a response to a specific person.

Questionnaire
Research instrument that consists of a set of questions or other types of indicators, with the goal of collecting information from a respondent.

Method
Combination of how the sample / participants will be contacted, the questionnaire questions administered, and the responses collected.

Finding
Evaluated result from data collected via survey, in relation to survey objectives and criteria.

Topic
For the purposes of this guide, a topic is considered as any matter related to survey indicators and that arises from those indicators or that contributes to defining them.

Care work
Comprises two types of overlapping activities: direct, personal, and relational care activities, such as feeding a baby or caring for a sick partner; and indirect care activities, such as cooking and cleaning. Unpaid care work consists of the provision of care by caregivers who receive no financial compensation in return. Unpaid caregiving is seen as work and is, therefore, a fundamental dimension of the world of work.

Paid care work
Performed by care workers in exchange for remuneration or benefits. This label comprises a wide diversity of personal service workers, such as nurses, medical staff, and personal care workers. Domestic workers, who provide both direct and indirect care at home, are also part of the paid care workforce.

Unpaid care work
Makes an important contribution to a country's economy, as well as to individual and societal well-being. Unpaid caregivers meet the vast majority of care needs around the world. However, their unpaid care work remains largely invisible and unrecognized, and is not taken into account in decision-making

D Appendix 1

Template to apply this questionnaire

Definition of goals
Answer the document's guide questions

Sample
- Entire organization / company
- A subsection of the population,

Which?

Reasons

Survey components – question selection
- Demographic data
- Human impact of responsibilities
- Care work
- Time invested in responsibilities
- Access to support resources
- Access to outside-of-work support resources
- Exploring other support options
- Other:

Necessary resources and time investment
- Questionnaire approval and application dates
- Approval on communications (Invitations)
- Definition of parties involved and time

Method to apply the survey
- Personal / telephone interview
- Virtual interview
- Self-managed through a webpage
- Self-administered in physical format (Paper)

Timeline
Survey and plan, ready for approval

Test date

Date for sending informational email to key stakeholders

Date for sending email, with information and an invitation to participate in the sample

Survey launch date

Date to follow-up / Send reminders

Date to close the survey

Date to send thank-you email to participants

Period to organize and analyze data

Period to prepare reports

Period to create action and follow-up plans

Date to share results and plans

Other notes and important considerations other notes and important considerations

E Appendix 2

Informed consent

Family, personal life, and work balance for working persons during COVID-19

Thank you for your participation in completing the following questionnaire, which you can complete in about [indicate average time here].

Before beginning, please read the following information carefully.

The goal of this questionnaire is [include objective (s) here]. Your participation will help us [here, indicate possible benefits].

The provided information will be considered confidential. Under no circumstances will your answers be associated with your name or any other identifying information. Your data will be stored in [for example, a digital file that can be accessed only via the (department in charge) password], who have signed a confidentiality agreement. The data you provide will be used only for the purposes specified in this document.

Your participation is completely voluntary and you may stop at any time.
We will be in the best position to answer any questions or comments before, during, and after your participation, via the email [insert contact email].

I agree to participate in the questionnaire voluntarily:

Yes No

F Appendix 3

Action plan – post-survey

Objective Achieved Yes No

Organization:

Date:

Survey Element(s) to Work on:

Survey Findings that Support the Action Plan:

Action Plan Objectives:

Reason for this Effort:

Opportunity Strength

Head of the Action Plan:

Support Team:

PLAN

Specific actions	Expected results	How is success measured?	Responsible party /Área	Estimated finalization date	Actual finalization date

PROGRESS

General Summary on Progress	Review 1 on Date	Review 2 on Date	Review 3 on Date	Review 4 on Date

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