

## Guidelines for Selecting Survey Takers in 360-Degree Feedback Surveys

Research shows that multi-rater surveys have many advantages over just manager ratings – greater accuracy, receptivity by people being rated, impact, and likelihood of developmental actions being taken. However, these advantages depend heavily on the survey takers (raters) selected. This *Insight* white paper provides guidelines on this matter, and suggested communications to participants (people receiving feedback).

### **Alternative Approaches**

The alternative approaches to selecting survey takers vary in terms of the degree of control participants have in making the decisions:

- Participants are given guidelines, and then choose their own survey takers.
- Participants choose their survey takers, but their managers are required to approve the list before the surveys go out.
- The managers of participants choose the survey takers, and then inform the participants.
- Someone in the company (usually in the HR department) identifies the survey takers according to established rules (e.g., peers are all those who report to the same manager as the participant).

Some companies don't want to give participants complete control over the selection of survey takers because of a concern that some participants will "stack the deck" with people they expect will give more favorable ratings. In practice, this concern is probably exaggerated, because most "good friends" are also likely to be more candid.

At any rate, there are two important reasons for having some degree of participant involvement in the selection process. First, they know best who is familiar with their performance and, therefore, could provide accurate ratings. Second, involvement significantly increases buy-in and perceptions of fairness.

***The advantages of multi-rater surveys depend heavily on the survey takers (raters) selected.***

### **Selecting Survey Takers by Role**

The roles (types of survey takers) in a multi-rater survey could include self, manager, peers, direct reports, and internal customers (or business partners, etc.). Not all roles have to be included for the feedback to be of value. The question of which survey takers to select is mainly an issue for peers and internal customers.

The self is obvious and is almost always included. The manager is also obvious, although there is the issue of participants who have more than one manager. In those situations, all managers are usually included, and it may be desirable to report their ratings separately in the feedback report. Censeo recommends that all direct reports be invited to participate. This avoids the problem of having to explain why some were selected and not others, and it doesn't increase costs. (Most vendors, including Censeo, base their pricing on the number of participants, with an unlimited number of survey takers.)

So, decisions about who to select as survey takers must be made only for peers and internal customers. (As an aside, few companies include both of these roles in the same survey.) The best survey takers, of course, are those whom the participant works closely with, who can accurately rate the demonstrated behaviors and skills of the participant. The remaining question is, how many survey takers should there be in each of the roles? Censeo recommends *at least five* as a rule of thumb.

### **Communicating Guidelines to Participants**

When participants are involved in selecting their survey takers, it's helpful to provide them with a few guidelines. The suggested content on the next page can be revised to meet your specific needs. The information can be included in a letter, a memo, or an email message that also addresses other survey-related issues (purpose of the survey, how the results will be used, schedule, etc.).

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To: Multi-rater survey participants

From: Senior manager or HR

One of your first steps in the multi-rater survey process is to select the people who will provide you feedback. This is a very important step, as the quality and accuracy of the information you receive depends on whom you select. Here are a few guidelines:

- You'll complete a self-survey, but you don't have to assign yourself; you'll get it automatically.
- Your manager will complete the survey. If you have two managers, you should select both.
- Select all of your direct reports. Input from many people is better than just a few, and you will avoid having to explain why some people were selected and not others.
- Select at least five peers – people you have worked closely with for some period of time, and who know your capabilities well. They will generally be about the same level as you, and they may or may not report to the same manager as you.

Avoid the temptation to select people you think might give you more favorable feedback. Be honest with yourself, and select people who know you very well.

The ratings made by peers and direct reports will be confidential in that you won't see individual ratings, but only the averages. This is done to promote more accurate and honest feedback.

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### **Reporting Results by Roles**

The number and types of survey takers, and the approach used to select them, is related to another important topic – how the responses from different roles are combined to produce overall scores for competencies and items. The feedback report shows the results for each role (which is extremely valuable), but the issue is how they are combined for overall scores (averages) that can be compared to the self-ratings.

Censeo provides two alternatives, both of which exclude the self-ratings:

- Each survey taker counts equally (e.g., if there is one manager and nine other survey takers, the manager's rating counts 1/10 of the average).
- The average scores are calculated by weighting the roles (e.g., managers, peers and direct reports each count 1/3). There is complete flexibility on the weightings applied to each role.

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