Creating a survey or consultative ballot on Surveygizmo

Open Surveygizmo

Click on 'Create a Survey'

Start from Blank Survey

Name your survey appropriately in the "What would you like to name this Survey?" box

Pick a team (Admin, Campaigns or Local ballot etc)

Start Building

Select 'Style' tab

Click 'Themes'

Select 'Your Theme Library'

Select 'UCU main' (or whichever suitable)

Apply changes

Select 'Build' tab

Name 'Page 1' if required

If you need a preamble or introduction click 'Text/Media'

Add new 'Question'

Click on box below 'Question type' and select the type of question you want

Common types are 'Radio Buttons' (multiple choice), 'Checkboxes' (multiple selections), 'Rating Scale

Take the simplest one 'Radio Buttons' as an example

Enter text of question into the box provided

Type in or paste the options as required

Clicking the 'Require this question' box will mean participants have to complete this question to proceed with the survey

Save the question

If required you can set the survey up to jump to particular questions based on the participants responses. Select the 'Logic' tab and, for example, tick 'only show this question based on answers to previous questions'.

Set the logic conditions as desired

Continue to add questions – you can split into sections by grouping themes into different pages etc.

Amend the 'Thank You' message as appropriate

Sending out surveys and ballots

Click 'Share' tab

For surveys or forms where you aren't restricting participation to a single unique entry you can copy and share the general 'primary link' (click 'Customise this link' if you want to change the wording of the link). You can then copy/paste that link into emails etc. and circulate.

For ballots where you want to send out a unique link via Surveygizmo you can do so via an 'email campaign'

Select 'Send Via Email Campaign'

Name the email campaign

'Create email campaign'

If you wish to 'house style' your message you will need to copy/paste the 'source' coding from a previous email campaign.

Go into previous ballot

Select 'share' tab

Select the email campaign

Select the message

Click the 'Source' button, select all and copy it

Go back to your new ballot and find the email campaign ('Share' tab, click on the email campaign, 'Edit message')

Click on 'Source', highlight everything and paste over your copied information.

Click 'Source' again and it should bring up a house-styled copy of the previous ballot message.

Delete the default text (except for the 'Click Here To Start Survey' bit – that is the link to vote)

Add your own text which will constitute the email that goes out to participants

Add subject line

'From' – enter University and College Union

'Reply to' – noreply@ucu.org.uk (unless you want replies to come back to a specific address).

Save message

'Send test' and make sure happy

'Add contacts'

Upload a Spreadsheet

Choose the file you will have saved and prepared on your PC

Upload

Send or schedule