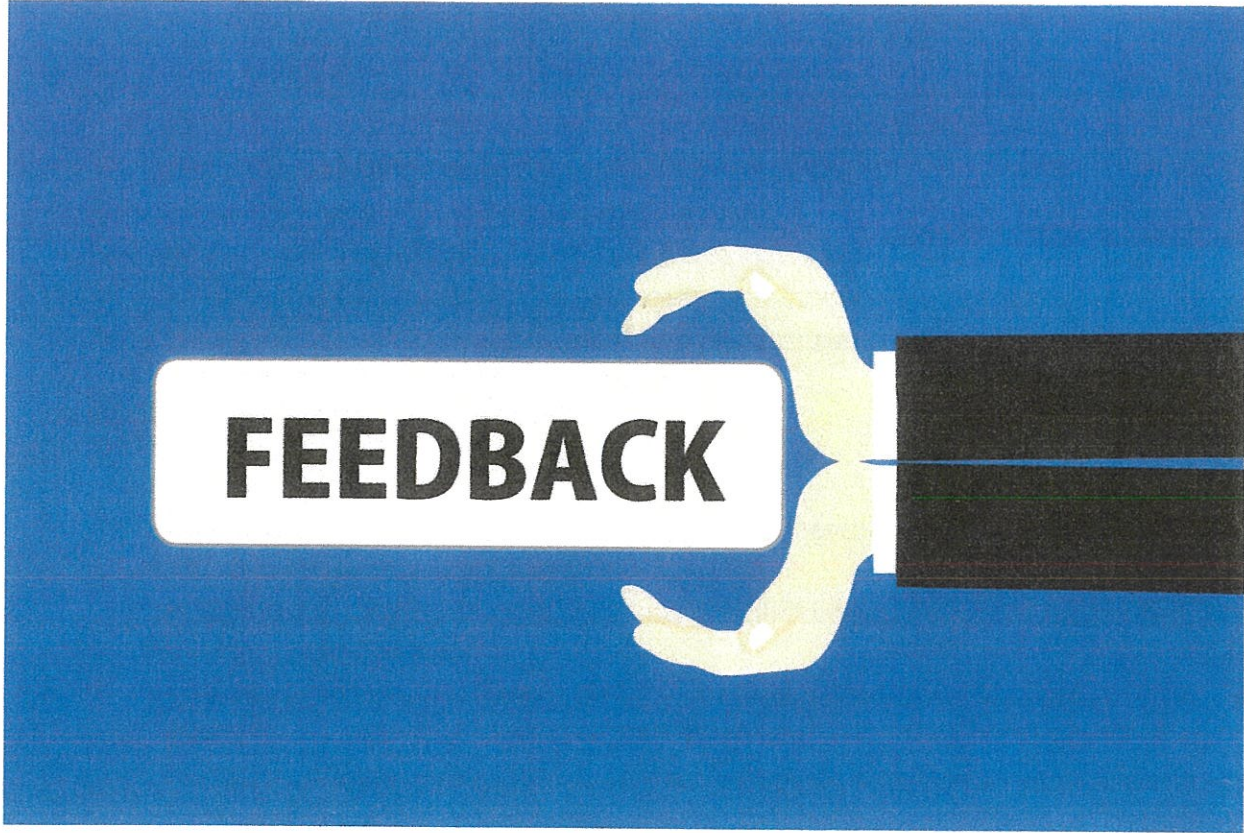


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Employee Satisfaction Survey

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- Launch a customized **Lattice employee satisfaction survey**, to cover engagement, leadership, communication, career development, and workplace culture.
- Conduct **focus groups** or 1 on 1 interviews with employees and managers.
- Review **HR records and performance data**.
- Collect **anonymous feedback** to encourage honesty.

Method for Collecting Information:

- **Organizational Structure:** Roles, departments, reporting lines, and key stakeholders.
- **Workforce Data:** Employee demographics, tenure, turnover rates, and recent engagement metrics (if applicable).
- **Current Employee Sentiment:** Previous surveys, feedback, exit interviews, and HR reports.
- **Business Goals & Priorities:** Strategic objectives that impact workplace culture and employee engagement.
- **Policies & Procedures:** HR policies, onboarding, performance review processes, and communication channels.
- **Challenges or Concerns:** Any known conflicts, low morale areas, or recent incidents.

To ensure an effective assessment, I would gather:

1. Information Needed Before Beginning

Scope of Services - What's included/What's needed to begin:

I will conduct an employee satisfaction survey for the Dolores Public Library to assess engagement, leadership effectiveness, and how policies and procedures are applied in day-to-day management. The survey will be administered anonymously and electronically using the **Lattice survey platform**. Quantitative ratings and written feedback will be analyzed and compiled as detailed below.

Overview:

2. Preparing a Summary & Assessment

Steps:

1. Compile survey results from Lattice into **charts, graphs, and tables**.
 2. Analyze trends: strengths, weaknesses, patterns across departments, and critical concerns.
 3. Cross-reference with HR metrics (turnover, absenteeism) to see correlations.
 4. Draft an **assessment report** including:
 - Key findings
 - Areas of strength
 - Areas needing improvement
 - Recommendations
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3. Presenting Results to the Board

- Create a **concise executive summary** (1–2 pages) highlighting major insights.
 - Present a **visual dashboard** from Lattice for clarity.
 - Focus on **impact on business goals** (productivity, retention, morale).
 - Use storytelling to communicate employee experiences and concerns.
 - Allocate time for **Q&A** and discussion of specific challenges.
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4. Presenting a Planned Method to Address Concerns

- Outline a **step-by-step action plan** based on assessment findings:
 1. **Immediate interventions** (e.g., addressing urgent morale issues).
 2. **Medium-term initiatives** (training programs, leadership coaching).
 3. **Long-term strategies** (policy updates, cultural initiatives).
 - Include **measurable goals and KPIs** to track improvement.
 - Highlight **responsible parties, timeline, and required resources**.
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5. Follow-up *options / Training / Coaching

- Offer **workshops** for managers on improving engagement, feedback, and communication.
- Provide **coaching sessions** as needed.
- Deliver **ongoing check-ins** (quarterly pulse surveys via Lattice) to monitor progress.
- Develop a **resource toolkit** with best practices for staff engagement.

***Follow up services are optional beyond completion of survey & executive assessment**

Goals of Survey:

1. Measure engagement, morale, and workplace culture
2. Identify strengths and improvement areas
3. Evaluate leadership, communication, and management practices
4. Understand workload, consistency, and work-life balance
5. Support retention and ensure employees feel heard

How information will be obtained and compiled:

Responses will be collected *anonymously* using the **Lattice survey platform** for electronic data collection. Survey results will be compared across teams and management levels to assess consistency in how policies and procedures are applied to operations. Quantitative ratings will be analyzed to identify trends and gaps between written policy and actual practice, while written responses will be reviewed and grouped into common themes (whilst monitoring anonymity).

I will personally analyze the survey data and summarize findings for leadership, including clear, actionable recommendations for future improvement.

Qualifications

With 8 years of HR consulting experience, I partner with small businesses (20 or fewer employees) across Utah, Arizona, and Colorado. I specialize in small business success strategies and creating customized policy/ procedure outlines that align with state and federal regulations while reflecting each company's unique culture.

Similar Projects:

Contento Café (2024):

Employee surveys identified gaps in communication between ownership and management; implemented a 6- month collaborative meeting schedule, staff engagement programs, and follow-up coaching to improve collaboration.

Red Willow Counseling (2023):

Employee engagement surveys revealed challenges in teamwork and collaboration; implemented flexible scheduling, targeted engagement initiatives, and follow-up coaching to strengthen team cohesion.

The Cookout Non-Profit (2024):

Volunteer engagement survey identified burnout risks; introduced wellness initiatives and peer supervision to support sustainability and volunteer retention.

About Me & My Human Resources Approach

I firmly believe all employee behavior is communication, whether it's positive or negative, conscious or subconscious. When leadership interprets employee communication as something "emotional" or personal, they risk absorbing those emotions themselves, which can cloud judgment and impact performance.

Strong leadership requires clarity, not reactivity. People thrive with boundaries. People thrive with structure.

When ownership, management, and boards hold every member of an organization accountable for their ripple effect. How their actions influence the culture and the people around them- most workplace challenges become solvable.

My work focuses on helping organizations implement both in ways that are practical, human, and sustainable long term. I show teams how to create accountability systems that feel empowering, systems that any person, at any level, can understand and use.

Completed SHRM and HRCI PRO Courses:

- Leadership & Navigation
- Ethical Practice
- Inclusive Mindset
- Relationship Management
- Communication
- Business Acumen
- Consultation
- Employee Grievances
- Progressive discipline
- SMART Goals for performance Evaluation
- Federal Acts and Legal compliance (CO,UT, AZ)
- Analytical Aptitude
- Management Skills
- People Analytics
- Quickbooks Online Payroll
- Benefits Administration
- Data Analysis
- Employment Law

Timeline

Phase	Duration*
Planning & Information Gathering	8Hrs
Lattice Survey Deployment & Customization	20Hrs
Data Analysis & Report Preparation	8hrs
Board Presentation & Discussion	1-2 days
Implementation Planning & Training	TBD

*These hours are subject to change based on board recommendations and any additional time required to implement changes.

Fees

Annual Retainer: \$750 (payable upon project initiation and contractual agreement).

Hourly Rate: \$95/hour for services rendered beyond the retainer.

Additional expenses incurred (e.g., printing, software tools) must be pre-approved in writing by the Dolores Public Library.

