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## Overlake Hospital

### Using a Web-Based Software Tool to Measure Workplace Climate

Overlake Hospital Medical Center is a 337-bed, not-for-profit regional institution offering a full range of advanced medical services to the Puget Sound region. To local residents, Overlake is more than a hospital: it is the only Level III Trauma Center in eastern Puget Sound and it stands at the forefront of cardiovascular care and treatment. It has been ranked as a top 100 heart program in the country, a top performer in the state of Washington, and has received many regional and national awards.

The task of maintaining current care quality and reaching to still higher levels is a challenge to Overlake's 700 doctors, and 2,300 full and part-time employees. Healthcare is a talent-intensive industry, and medical institutions around the United States face a highly competitive labor market in which the demand for many skilled positions—nurses and medical technicians, in particular—outstrips supply. Consequently, retention and recruiting at Overlake and other institutions across the country is a matter of strategic importance.

No one at Overlake understood this better than Lisa Brock, who joined the hospital in 2002 as Vice President of Human Resources. As the new head of HR, she needed up-to-date information on the hospital's workplace climate, as perceived by employees and managers. An accurate assessment would serve as both a base line and as a jumping off point for future improvements. Unfortunately, the hospital had not conducted an employee survey for five years prior to Brock's arrival. Thus, the data she had was not timely. "I needed a current assessment of morale and how people felt about different aspects of our working environment," she recalled later. That assessment would be essential in pinpointing specific areas of strength and weakness, and guide improvement initiatives from her office. "How are we doing? What are our issues? What do we have to work on? Those were questions I hoped to answer." But the HR department had no systematic way of measuring employee attitudes.

Overlake's CEO at the time, Ken Graham, suggested a solution. Graham was acquainted with InfoTool, a Web-based organizational assessment methodology developed by Stan Labovitz. InfoTool's workplace climate survey appealed to Graham's new VP of Human Resources for a number of reasons:

- it was scalable to the organization's size
- its measurement capabilities offered a precise view of each department in the hospital, giving managers a sound basis for action
- it complemented the "balanced scorecard" performance assessment system used by Overlake's executive team

- it could be customized to assess the dynamic elements of the hospital's workplace environment
- the tool offered the latest in diagnostic analysis.

Finally, InfoTool was easy to use. As Brock observed later, "One of its strengths over other tools is its technology, which is extremely user-friendly with wonderful, easy-to-use graphics. And once you have the data, you can cut it any way you want without additional charges. Comparable tools add a charge every time you re-cut the data."

### Administering the Survey

Overlake's first experience with InfoTool took place in April 2004, when a work climate survey was offered to all employees on a voluntary basis. That survey contained over seventy statements designed to assess how people feel about their working environment. Exhibit 1 shows a portion of those questions and scoring choices offered to respondents, who anonymously indicated their agreement with those statements on a 1-to-10 scale. They did this either online (at home or at work) or via a paper form.

**Exhibit 1** .....  
**Questionnaire sample**

Overall Satisfaction															
1.	If a friend, family member or colleague were seeking employment, I would recommend Overlake Hospital.	Strongly Disagree	0	1	2	3	4	5	6	7	8	9	10	Strongly Agree	N/A
2.	I am valued by the organization.	Strongly Disagree	0	1	2	3	4	5	6	7	8	9	10	Strongly Agree	N/A
3.	I am proud to work for Overlake Hospital.	Strongly Disagree	0	1	2	3	4	5	6	7	8	9	10	Strongly Agree	N/A
4.	The work that I do is important to Overlake Hospital's future.	Strongly Disagree	0	1	2	3	4	5	6	7	8	9	10	Strongly Agree	N/A
5.	I plan to work in this organization for the	Strongly Disagree	0	1	2	3	4	5	6	7	8	9	10	Strongly Agree	N/A

Employees were also asked to respond to open-ended questions such as: "What three things do you like best about Overlake Hospital?" These questions asked them to select any one of dozens of three-part responses, such as:

*Professional atmosphere. Caring co-workers. Quality care for patients.*

*Senior management has responded to my concerns with positive results. I find my job challenging and fun. My manager is a good person to work with.*

*My co-workers. Proximity to home. Pay.*

*The hours I work. Benefits package. The people I work with.*

Most employees completed the survey in about twenty minutes.

## Encouraging People to Respond

Overlake's HR department relies on volunteer participation of employees in its surveys. Volunteerism in Lisa Brock's experience often needs a little boost. She and her colleagues encourage participation through a combination of incentives and frequent communication. The first year, for example, all participants received a free gym bag. An umbrella was the next year's reward. For 2006 and 2007, every survey participant received a \$10 gift certificate redeemable in the hospital cafeteria. "Communications is also very important in getting a high level of participation," according to Brock. "We announce the annual survey with paycheck envelope stuffers, through the employee newsletter, the company intranet, and fliers. You have to communicate in different ways to reach people."

Overlake's program of incentives and multi-channel communication has paid off. Roughly 1,600 of 2,300 full- and part-time employees completed the climate survey in 2007, a figure that is considered good for an institution with many part-timers and on-call employees.

## Analyzing the Data

Thanks to its graphic analysis, InfoTool made it possible for Lisa Brock and hospital managers to quickly see how employees rated the work climate at that point in time. Exhibit 2 contains one of the graphic displays produced by the InfoTool software engine; it reflects the combined views of 1,778 employee respondents to the 2005 survey. In terms of "overall climate" they gave the hospital a score of 65, as shown in the center circle. That's a mediocre grade in the InfoTool system, where green represents good performance, yellow represents average performance, and red represents sub-standard. Each of the *drivers* of employee satisfaction—culture, employee development, leadership, and so forth—is also scored by number and by color. InfoTool even drills down to the contributing *components* of those drivers. For example, the components of "Employee Development" at Overlake are training, recognition, and rewards. Each of those is scored based on survey responses. A quick look at this graph reveals that performance was overwhelmingly average, with only one of the contributing components—commitment—receiving a high mark.

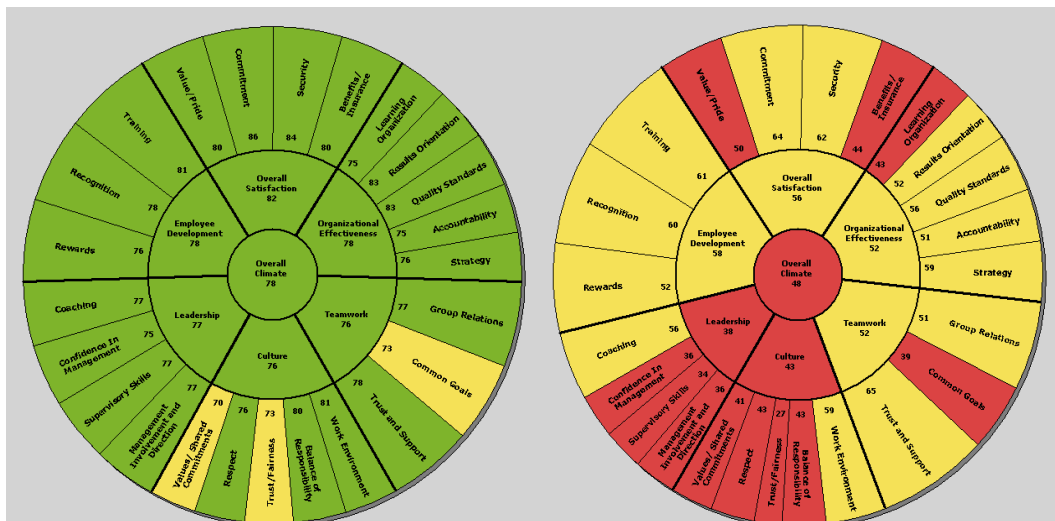
## InfoTool's Scoring System

Green = Good; 80-100  
Yellow = Average; 56-79  
Red = Poor; 0-55



departments. The seven employees in the Senior Care unit, for example, were almost overwhelmingly favorable to their work climate, whereas, members of the 89-person Intensive Care (IC) unit gave their work climate very low scores (Exhibit 3). Something was clearly amiss in Intensive Care. Before remedial steps could be taken, however, managers had to understand the reason for its low scores.

**Exhibit 3** .....  
**Two different InfoTool screenshot views of work life: Senior Care (left) and Intensive Care (right)**



### From Analysis to Action

Why was the IC unit’s work climate viewed so negatively by employees? InfoTool provided a number of mechanisms for drilling down to the details of what was bothering employees in that important activity. Exhibit 4 displays the ten most important Strength/Weaknesses screen for the IC unit in the 2005 survey. Notice in the “weaknesses” section the low scores (red) accorded to Trust/Fairness, Management Involvement, and Confidence in Management. By viewing employee responses to statements about these areas, hospital managers were able to get closer to the sources of employee discontent. Notice, for instance, the extremely low agreement (26 out of 100) given to the statement, “I have confidence in the fairness of management.”

**Exhibit 4** .....  
**InfoTool screen shot of strengths and weaknesses in the Intensive Care unit**

Show 10 ▾

**Demographic Factor**  
 ICU/CCU

**Strengths**

No.	Category	Question	Mean
1	Commitment	4. - The work that I do is important to Overlake Hospital's future.	77
2	Security	9. - What happens in this organization is important to me.	73
3	Recognition	77. - My most recent performance review reflects my job performance.	71
4	Strategy	25. - I know what is expected of me in my job.	71
5	Work Environment	36. - I find my work interesting and challenging.	71
6	Quality Standards	18. - Employees are expected to produce quality work at Overlake Hospital.	70
7	Trust and Support	34. - We have confidence in each other's abilities.	68
8	Commitment	5. - I plan to work in this organization for the coming year.	67
9	Training	79. - I am expected and encouraged to learn new skills as part of my job.	67
10	Recognition	76. - I get positive feedback from other employees about my work.	66

**Weaknesses**

No.	Category	Question	Mean
1	Trust/Fairness	42. - I have confidence in the fairness of management.	26
2	Trust/Fairness	43. - My Manager is a person I can trust.	26
3	Management Involvement and Direction	53. - My Manager listens to what people have to say.	27
4	Confidence In Management	68. - I have had at least one opportunity to interact with my Vice President in the last year	28
5	Trust/Fairness	41. - I feel I can trust what the organization tells me.	28
6	Supervisory Skills	59. - My Manager handles my work-related issues satisfactorily.	30
7	Supervisory Skills	60. - My Manager sets a good example.	30
8	Common Goals	31. - My Manager performs actions that reinforce the common purpose of the organization.	31

Another InfoTool function that helped managers get closer to the source of problems was the "Items" screen (Exhibit 5), which listed questions and how IC unit employees responded to them. Every red score in the 2005 items screen alerted management to an issue that needed attention. Consider, for example, the low score (34 on a scale of 100) given to question 14: "My manager responds positively to new ideas we come up with." This was a fixable problem once it was identified.

## Exhibit 5 ..... InfoTool items screen, IC unit, 2005 survey

Demographic Categories:

Department ▼

Demographic Selection:

- ▲ Clinical Educators
- ▲ Day Hospital, OP Psych& Specialty School
- ▲ East I
- ▲ East III
- ▲ East II-Telemetry
- ▲ Echo
- ▲ Education-Family
- ▲ Emergency Services
- ▲ IP Psych
- ▲ ICU/CCU
- ▲ Inpt. Surgery
- ▲ Labor & Delivery
- ▲ Mother/Baby
- ▲ Nurse Staffing

ICU/CCU 89

**Demographic Factor**  
ICU/CCU

No.	Question	Mean	Standard Deviation
1	If a friend, family member or colleague were seeking employment, I would recommend Overlake Hospital.	54	30
2	<b>I am valued by the organization.</b>	<b>42</b>	27
3	I am proud to work for Overlake Hospital.	53	27
4	<b>The work that I do is important to Overlake Hospital's future.</b>	<b>77</b>	25
5	I plan to work in this organization for the coming year.	67	27
6	<b>Overlake Hospital gives me the opportunity to do my best.</b>	<b>49</b>	26
7	I have a secure future in this organization.	59	29
8	Overlake Hospital has a bright future.	54	26
9	What happens in this organization is important to me.	73	24
10	<b>Overlake Hospital's medical insurance package is competitive in this market</b>	<b>45</b>	25
11	<b>I am satisfied with Overlake Hospital's overall benefit plan.</b>	<b>43</b>	25
12	<b>I am encouraged to find new and better ways to get the job done.</b>	<b>50</b>	28
13	<b>Our work environment supports innovation.</b>	<b>43</b>	28
14	<b>My Manager reacts positively to new ideas we come up with.</b>	<b>34</b>	28
15	<b>Overlake Hospital follows through on its goals.</b>	<b>42</b>	26
16	My group works in a focused, efficient way.	53	29
17	In our work group, we are results oriented.	61	27
18	Employees are expected to produce quality work at Overlake Hospital.	70	26
19	Overlake Hospital has high performance standards.	64	27
20	<b>My Manager balances quality results and meeting deadlines when making decisions.</b>	<b>35</b>	28
21	<b>Employees are encouraged to get the job done in whatever way they think best.</b>	<b>43</b>	29
22	<b>Overlake Hospital is an organization where people have complete responsibility for their jobs.</b>	<b>49</b>	29
23	Overlake Hospital is a place where employees are held accountable for meeting performance standards.	60	29
24	<b>I understand Overlake Hospital's strategy.</b>	<b>44</b>	33
25	I know what is expected of me in my job.	71	27
26	It is clear how my work fits into the overall picture of this organization.	63	31
27	<b>Groups in this organization work effectively together.</b>	<b>49</b>	26

### Before and After

Once they understood their problems and, thanks to InfoTool's segmenting capabilities, exactly where those problems were located, Overlake developed initiatives to overcome them. HR department "facilitators" met with division and department leaders to discuss survey results and develop improvement action plans. The hospital also developed a policy mandating that all leaders and managers whose units rated below average on the workplace climate survey would be *required* to include workplace climate improvement among their personal goals for the coming year. Those goals, in turn, were aligned with the organization's rewards system. In addition, a number of Overlake managers participated in Web-based conferences with InfoTool CEO Stan Labovitz; those sessions helped them use survey results to diagnosis problems and develop plans to overcome them. The HR department also began a four-pronged initiative to increase employee satisfaction in all departments. That initiative stressed employee appreciation, more effective training, and made sure that people had the equipment and supplies they needed to do the jobs they were trained to do. It also asked people directly, "What do we have to do to get a '10' on each survey response. Between 2005 and 2007, those actions produced *measurable* improvement in how employees viewed their work climate.

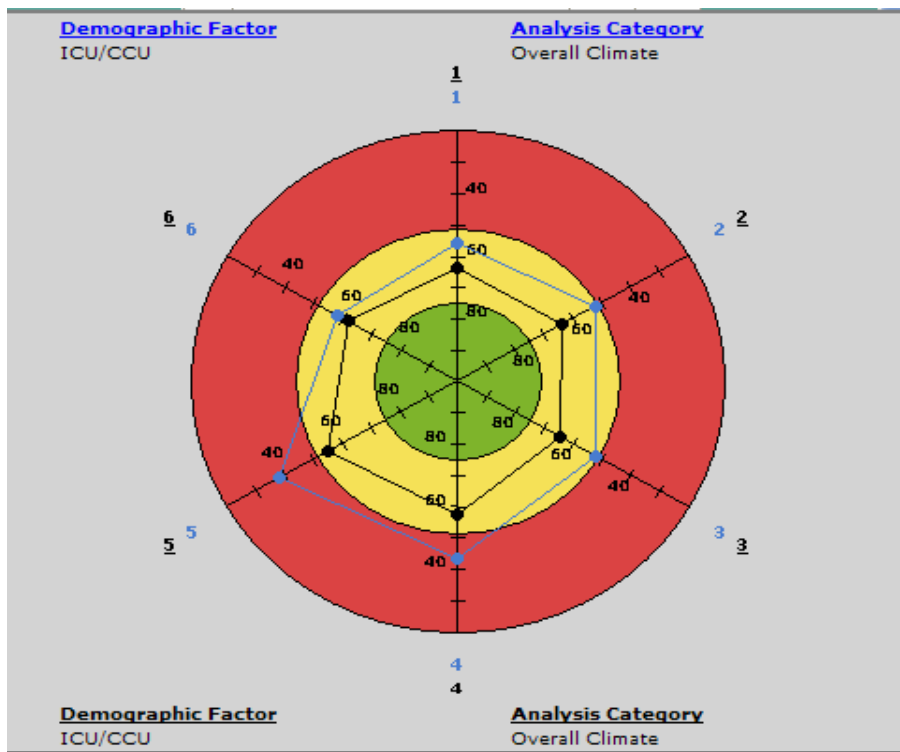
Exhibit 6 combines 2005 and 2007 "overall climate" scores for the problematic Intensive Care unit at Overlake, as assessed by unit employees. As the exhibit indicates, this unit still has a long way to go before it hits the green area, but

progress is significant. Alerted to problems by the 2005 survey, management intervened, and its actions clearly made a difference. In this InfoTool screen shot, 2005 results are shown in blue and 2007 results in black. The six dimensions measured are:

1. Overall satisfaction
2. Organizational effectiveness
3. Teamwork
4. Culture
5. Leadership
6. Employee development

The dots on each of those dimensions represent the mean scores given by unit personnel in each of those two surveys. As shown, substantial improvement was made along each dimension, leadership in particular, which improved by 44 percent! Other units and employee groups demonstrated similar improvements over the two-year period, demonstrating an important truth of organizational life: if managers can pinpoint problems, they can usually identify their causes and develop effective remedies. The result is organizational improvement and higher performance.

**Exhibit 6** .....  
**2005 (blue) versus 2007 results (black), Intensive Care unit**



Overall Climate: Mean Scores, Intensive Care Unit

	2005	2007	% Change
Overall satisfaction	56	64	14.3
Organizational effectiveness	52	63	21.2
Teamwork	50	64	28.0
Culture	43	57	32.6
Leadership	38	55	44.7
Employee development	58	62	6.9

### Alignment Is Essential

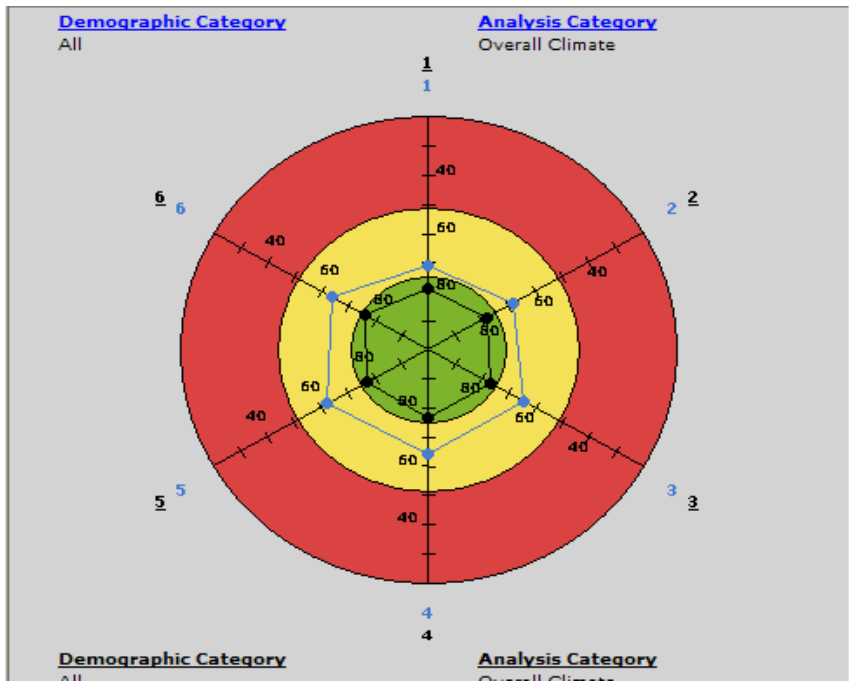
Lasting success in climate improvement and other initiatives, according to Brock, depends on alignment between organizational goals and rewards. As a “balanced scorecard” organization, Overlake ties its managers’ evaluations to how well their units perform relative to the four scorecard metrics: customer satisfaction, employee satisfaction, financial results, and internal processes. The annual InfoTool climate survey has helped the organization measure performance in one of those metrics: employee satisfaction. Says Brock, “Measurement and tying rewards to progress toward goals is how you get the attention of managers and convince them that this isn’t just a fad or just another thing they need to pay attention to. It’s a way of impressing them with the importance of these things to the organization.”

### Quarterly Checkups

Overlake Medical Center has used the InfoTool climate survey in each of the past four years. That survey contains 78 questions. To track the work climate *between* annual checkups, Brock has selected a dozen key questions from the question pool and administered them on a quarterly basis. She finds that her smaller pool of questions correlates closely the overall climate score determined by the full set. Though less than perfect, it gives her a finger on the pulse of the organization throughout the year. She also finds that checking employee responses to a smaller set of questions—the ones that matter most to employees—produces exceptional insights into the work climate within the hospital.

In the end, has all this work paid off for Overlake? The Intensive Care unit has surely benefited, but what about the entire organization? The answer is yes. Comparison of 2005 and 2007 climate surveys show measurable and significant improvement on all six dimension of workplace climate (Exhibit 7). Whereas every measure had been in the “average” (yellow) area per the 2005 assessment, all have now moved solidly into the “good” (green) area. In particular, employee assessments of the organization’s teamwork, culture, leadership, and employee development efforts had made sizeable leaps forward. The comparison of Exhibit 2 (before) and Exhibit 7 (after) are striking.

**Exhibit 7** .....  
**2005 versus 2007 results, Overlake Medical Center**



Overall Climate: Mean Scores, Overlake Medical Center

	2005	2007	% Change
Overall satisfaction	71	79	11.3
Organizational effectiveness	68	78	14.7
Teamwork	64	76	18.8
Culture	64	76	18.8
Leadership	62	76	22.6
Employee development	64	76	18.8

**Looking Forward**

Overlake Hospital Medical Center has come a long way since its initial “baseline” work climate survey. Its leadership group now understands both the big picture and where each division and department stands on the work climate issue. And thanks to four annual surveys, it can see the general trajectory of change and where progress is and is not being made. Individual managers can also see how well their units are doing and, thanks to InfoTool data, identify issues where their attention is most needed.

According to Lisa Brock, the hospital will continue to measure and monitor the workplace climate to better understand employee satisfaction. However, since retention is now the overriding concern of the people of the business, future surveys will focus more directly on that important issue.