Introduction

This User Guide provides instructions and guidelines for the administration and use of the Organizational Climate Survey made available by Netsmart Benchmarking. This Survey is an important tool that can assist in managing organizational climate and staff morale. In view of the close relationships between organizational climate and broader domains of organizational performance, the information provided by this survey can significantly impact effectiveness and efficiency.

The Survey

The Organizational Climate Survey is a 25-item instrument that is completed by staff members of the organizational workforce. A five-point Likert-type rating scale ranging from “Strongly Agree” to “Strongly Disagree” is employed. A check mark is placed by the respondent in the appropriate box. On items that are not applicable, respondents are instructed to leave the item blank. A section for narrative comments is provided.

Item content spans seven domains of organizational climate:

- Staffing/Co-Workers
- Recognition and Growth
- Leadership
- Compensation and Benefits
- Physical Environment
- Quality
- Satisfaction

Survey Management

Management of the Organizational Climate Survey is centralized through your on-line benchmarking account. To access the controls, logon to your on-line benchmarking account and select the “Organizational Climate” bullet point in the Administrative Tools section of the Administrative Page.

On the page that appears, a control panel containing various tools is provided to manage the Organizational Climate Survey:
**To Administer the Survey:**

Please copy the following link so you can email it to the individuals in your organization that you would like to have perform a survey:


**Sample Notice to Staff Requesting Survey Completion:**

To view a sample notice requesting that your staff complete the survey, please [click here](#). This note is for illustration only. As long as your note includes the above web link, it can contain any information determined to be appropriate. If your organization has specific plans as to how the information will be used, it is recommended that a sentence or two be added to describe those plans.

**Number of Completed Surveys this Reporting Period:**

Your organization has 0 survey(s) stored for the current period, October to December 2010

**Organizational Climate Survey User Guide:**

Please [click here](#) to view the organizational climate survey User Guide

**Organizational Climate Survey (Blank):**

Please [click here](#) to view the blank organizational climate survey

**Sample Report:**

Please [click here](#) to view a sample report

**Survey Customization:**

We are accepting requests for survey customization (break-outs by program or role; additional questions; etc.). Survey customization requires a modest fee. If you are interested, please [click here](#) for further information or to submit your customization request.

**Authorized User:**

Due to the specific and sometimes highly candid nature of the narrative comments that are provided on the organizational climate survey, we require the selection of one authorized user per organization that will be provided access to your organizational climate reports. Reports will not be made available to your organization until this selection has been made. Please [click here](#) to access the page that allows you to specify your authorized user.

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**To Administer the Survey**

The survey is administered to staff via an anonymous on-line survey. Your staff members are directed to the survey via a dedicated web address that is assigned to your organization. Your organization’s unique URL is presented in the on-line control panel, as illustrated in the example above. **Do not use the above URL—it is just an example.** Copy the URL from your on-line benchmarking account and paste it into the notice you will be sending to all staff to notify them of the survey. When a respondent completes the survey, the data is automatically entered into the database. Therefore, survey administration does not impose any burden on the organization for data collection, manipulation, or submission, other than notifying employees of the survey and the web address.
Sample Notice to Staff Requesting Survey Completion
The notice of the survey that is sent to staff should contain certain recommended information, for example, the deadline for completion. Generally, staff should be given 2-3 weeks to complete the survey. To download a sample version of the notice, click on the link in the second row of the on-line control panel. The notice must include the organization’s unique web address for the survey. If leadership has a plan as to how the survey findings will be used, it would be helpful to describe it.

Number of Completed Surveys this Reporting Period
As surveys are being completed by staff, the sample size can be determined by referring to the third section of the on-line control panel. The figure in the table will be updated each time the page is refreshed.

Organizational Climate Survey User Guide
Updated versions of the User Guide can be downloaded from this section of the control panel.

Organizational Climate Survey (Blank)
A blank PDF version of the Organizational Climate Survey can be downloaded from the link provided in this section of the on-line control panel. This is for reference and communications only. Please do not use the PDF or a printed version of the survey to gather responses. We cannot accept hard-copies of completed surveys for processing.

Sample Report
A sample of the Organizational Climate Survey report can be downloaded from the link provided in this section of the on-line control panel.

Survey Customization
Survey customization for the purpose of report break-outs is available for a one-time set-up fee. Survey responses can be broken-out by any variable desired, such as program, location, division, role, tenure, or other dimension. Currently, we are not customizing the survey to include new items, since benchmarking comparisons would not be available for those items. Please note that it is not possible to alter existing survey items.

Once the requested data breakouts have been specified, you will be provided with a Statement of Work and a price quote. The one-time set-up fee for data break-outs is a minimum of $200. When data is broken out, a separate report is generated for each response choice, along with the overall report.

Requests for customization should be made by contacting the Help Desk (help@bpsys.org).
Authorized User

Due to the specific and sometimes highly candid nature of the narrative comments on the organizational climate survey we require, we require the selection of one authorized user per organization that will be provided access to your organizational climate reports. Reports will not be made available for your organization until this selection has been made. Please click the link in this section to open the user authorization page and follow the instructions to complete your selection.

Reporting Periods

Four quarterly reporting periods are observed:

- January 1-March 31
- April 1-June 30
- July 1-September 30
- October 1-December 31

The deadline for submitting surveys is at 8:00 PM (Eastern Time) on the last day of the reporting period. Only surveys submitted prior to the deadline will be included in the analysis of responses for the reporting quarter. It is not possible to accept late submissions.

Organizations may choose to conduct surveys of their staff in one, two, three or all four reporting periods. No specific action on the part of the organization is required to proceed with survey administration—the survey is always open. The web address (URL) for the organization remains the same from quarter to quarter.

Sample Size

There is no maximum limit to the number of surveys that are completed each quarter or each year. However, to help ensure the reliability of the comparative data pool, reports will not be generated on a sample size of less than 10 completed surveys.

Reports

Due to the special sensitivity of organizational climate data and pointed narrative comments that might be made, report access is restricted to just one individual per organization. That individual must be designated by the CEO. Organization's submitting surveys will automatically receive an email request for the name and email of the individual authorized by the CEO to have access. We will then grant access to the individual so named.

Reports detailing your organization's staff ratings will be generated and made accessible approximately one week after the last day of the quarterly reporting period. Reports are made available as PDF documents and can be accessed by the authorized individual in the same manner as other benchmarking reports. If you are unfamiliar with the process, please follow these steps:
1. Go to www.bpsys.org
2. Click on the blue “Subscriber Login” button in the upper left area of the BPS home page
3. Click on “First Login?”
4. In the screen that appears, enter your e-mail address, a security question, and the correct response. Then select “submit”.
5. An email will be sent to you momentarily with your complete login information, including your password.
6. On the login screen, enter your e-mail address and the password you were provided. Click on “Login”. That will take you to the Administrative Page.
7. From the Administrative Page, select “View Reports”.
8. In the Report Type drop-down menu, select "Organizational Climate with Comments" and then click on "View Report". You can also select the "Organizational Climate without Comments" report type in the event you wish to share your report with the rest of your organization. The reports are identical with the exception that the "Organizational Climate without Comments” report has the comment section at the end of the report removed.
9. Your report will appear momentarily. You can print or save the document. A file of all of your Organizational Climate reports will be maintained in the View Reports section of the Administrative Page in this manner.

The report is composed of four sections, as follows:

**Section I: Overall Comparisons**  Section I compares your organization’s scores with all other scores derived from all behavioral health and human services organizations in the database.

The following normative and comparative statistical data is presented in Section I for each of the 25 survey items. Section scores are also provided for each of the seven domains noted above and an Overall Score that provides an average (mean) score across the 25 items:

**Your Mean Score:** Your Mean Score is the average of your program’s scores for that particular survey item. Survey responses are converted to a 100 point scale to facilitate interpretation, as follows: Strongly Agree=100; Agree=75; Unsure=50; Disagree=25; Strongly Disagree=0. For example, a survey item with all “Agree” ratings would result in a mean score of 75.0.

**Group Mean:** The average of the mean scores among all submitted surveys across all organizations submitting data for that particular survey item.

**Percentile Ranking:** Your program’s ranking with respect to the overall distribution of scores for that particular survey item. A percentile (%ile) ranking is a value on a scale of one hundred that indicates the percent of a distribution that is equal to or beneath it. For example, if a particular item score places you at the 60%ile, it means ratings on that item are as favorable or more favorable than 60% of the organizations within the database.

**Standard Deviation:** A measure of variability of scores for that particular survey item. The higher the number, the greater the variability in the population represented.

**Number of Organizations:** The number of organizations that submitted scores for that particular survey item.
**Number of Responses:** The number of survey responses that were received for that particular survey item, totaled across all programs that submitted data

**Section II: Benchmarking Initiative Comparisons** Section II compares your organization’s scores with other organization’s involved in your benchmarking initiative. The data in section II is organized in an identical manner as Section I. However, the values are broken out for that particular benchmarking initiative.

**Section III: Summary of Responses** This section provides a break-out of your organization’s data by response choice (strongly agree, agree, etc.). The number and percent of your respondents that selected each response choice for each item is presented. This section also reports the sample size for each item.

**Section IV: Narrative Comments** Narrative comments provided by staff in response to item 8 of the survey are reported verbatim in this section. In the survey, respondents are advised that their narrative comments will be included as part of the report to leadership and they are cautioned against providing information that might threaten their anonymity.

**Suspicious Activity Monitors**

A two-step process has been implemented to reduce the possibility of inappropriate submissions intended to distort the results. First, the back button for the survey has been disabled, which will prevent the easiest method of posting duplicate surveys. Second, a pattern-checking routine has been implemented that will evaluate each submission against other recent submissions to flag suspicious surveys. This check will occur each time a survey is saved for your organization. The administrators at will receive a message notifying them of the flagged surveys once a pattern has been identified. Each organization reaching a certain threshold of suspicious data will receive an e-mail notification when the quarterly organizational climate reports are distributed. This message will help you to understand the impact of the suspicious data. No automatic cleansing of data will occur.

**Responding to Your Data**

Your Organizational Climate Survey report may prompt pride, disappointment, or a complex range of reactions. Regardless of the reactions, however, next steps MUST be taken. Staff will be expecting to hear something about the findings and what might be done with the information. Narrative comments (section 4), in general, should NOT be shared with the broad workforce since they are often personal in nature and such disclosure may lead to speculation about their origins. The survey findings should be presented in the format that works best for the organization. In some instances, a simple narrative summary or table may suffice. In others, the entire first or second section of the report may be distributed. Leaders should consider what vehicles will work best.

Further recommendations for next steps are tendered below, based on three possible general scenarios.
Scenario A: Primarily Favorable Percentile Rankings

If the vast majority of your percentile rankings place your organization at the 70th percentile or higher, congratulations! You should be proud. The data is saying that your organization is managing its climate better than others in these difficult times. Try to identify the factors that are contributing to your success. Eventually, process benchmarking will be used to formally investigate this question but, until then, generate your best guesses. Then make certain that those practices are nurtured and maintained.

In addition to reviewing percentile rankings, mean survey scores should also be reviewed. Remember that mean scores above 50 are "positive" and those below 50 are "negative". Understand that some "negative" scores could still yield a favorable percentile ranking because the bar is currently set so low.

If your percentile rankings are relatively high but many of your average scores are on the negative side, that means you are managing organizational climate well but that you, and all other providers, must still strive to seek improvement. When overall conditions improve, mean ratings are likely to increase across all organizations. If you continue to manage your organization's climate well, your favorable percentile rankings should hold up.

If your percentile rankings are primarily favorable, it is particularly important to identify the disparate percentile rankings that place your organization below the 30% percentile. Those areas represent important departures from the positive norm and are especially important to attend to. It is often helpful to create short-term work groups to address these types of targeted issues. Work groups should include no more than 8-10 members and should be composed of both leaders and non-leaders. The group should be asked to examine the survey findings, ponder possible causes, and make recommendations for specific suggested actions. They should be requested to accomplish these tasks in less than 4 weeks. Any administrative action should be promptly taken.

Your workforce should generally be informed of the survey findings and any actions that are being taken. However, as noted above, you may wish to postpone that or to present the findings as "preliminary data". In presenting your findings, help them understand the comparative nature of the data. They may be confused as to how a negative score could translate into a favorable percentile ranking. Explain that it means your organization is faring better than others, even though the climate for all may be less than ideal.

Be sure to congratulate your workforce for the positive findings--do not present the findings as a feather in the cap of leadership. Note that all staff, both leaders and non-leaders, play a vital role in managing the climate of the organization.

Scenario B: Primarily Average Percentile Rankings

This is the scenario that will apply to most organizations. In this scenario, most percentile rankings fall in the broad middle part (31-69 percentile) of the range. Some may be outliers in the favorable or unfavorable range. The data is saying that, in general, your organization is managing its climate as well as others. That is an accomplishment in these challenging times! For some, this may be a pleasant surprise--very negative
findings might have been expected. For others, this may be disappointing—above average results may have been anticipated.

In addition to reviewing percentile rankings, mean survey scores should also be reviewed. Remember that mean scores above 50 are "positive" and those below 50 are "negative". Understand that some "negative" scores could still yield a favorable percentile ranking because the bar is currently set so low.

Identify the favorable and unfavorable outlier dimensions with percentile rankings higher than 70 or lower than 30. For the unfavorable outliers, it is often helpful to create short-term work groups to address these types of targeted issues. Work groups should include no more than 8-10 members and should be composed of both leaders and non-leaders. The group should be asked to examine the survey findings, ponder possible causes, and make recommendations for specific suggested actions. They should be requested to accomplish these tasks in less than 4 weeks. Any administrative action should be promptly taken.

Favorable outlier data may provide the impetus for congratulating your workforce. If appropriate, note that all staff, both leaders and non-leaders, play a vital role in managing the climate of the organization.

Your workforce should generally be informed of the survey findings and any actions that are being taken. In presenting your findings, help them understand the comparative nature of the data. They may be confused as to how a "negative" score below 50 could translate into a favorable percentile ranking. Explain that it means your organization is faring as well as or better than others, even though the climate for all is apparently less than ideal.

Scenario C: Primarily Unfavorable Percentile Rankings

If the vast majority of your organization's percentile rankings place it at the 30th percentile or lower, this will be the most difficult scenario to deal with. At the same time, it represents the most important scenario to address. Whether expected or not, this type of feedback from staff can invoke disappointment, anger, hurt feelings, or a host of other reactions. However, it is important to step back, maintain objectivity, and recognize the importance of the information.

While this knowledge may feel like a burden, it actually represents a vital opportunity. If the climate within your organization is much less favorable than others, then this is an important time to act. Doing so now can help prevent a major exodus of personnel when general economic conditions improve. It may be necessary to set aside personal feelings for the well-being of the organization.

If the vast majority of percentile rankings are in the unfavorable range, the data is saying that, in general, the organization is facing more challenges to its climate than others. Focusing on specific survey items may not prove to be all that helpful, because such findings are usually more attributable to generalized climate factors.

Often, uniformly unfavorable scores come in the midst of ambitious organizational change. Heightened expectations of staff generally lead to anger and this survey provides a good opportunity for its expression. In that sense, the survey can be
therapeutic in providing a cathartic release. It is important to interpret such findings in that context. At the same time, uniformly unfavorable findings should never be summarily dismissed. Remember that in the current environment, nearly all organizations have embarked upon some efforts to enhance their viability. Survey findings provide the opportunity to assess whether actions taken have perhaps been too aggressive or if they might have been implemented in a different manner.

Further insight may come from the narrative section of the survey report. Under the cloak of anonymity, staff comments will be candid and may often be harsh and accusatory. Pent-up frustrations can lead to hyperbole and exaggeration so it is important to adopt a "clinical" and objective stance when interpreting such feedback. Narrative comments may point to specific sources of discontent. The message that leaders "don't care", which often follows ambitious efforts to enhance organizational performance, is perhaps best interpreted as a communications issue.

Rather than forming various work groups to attack specific issues, it may be more productive to try to address the broader operative factors that underlie the current climate. This may be pursued by assembling a small work group to review the survey findings, understand their meaning, and make recommendations for specific actions. It might also be helpful to consider engaging an outside consultant to help the organization navigate its way through the issues.

**Customized Surveys**

Organizations that have chosen to customize their surveys may need to adopt a somewhat different strategy to determine next steps. If all of the break-out reports fall into one of the three scenarios described above, then the recommendations for that scenario can be followed. For example, if the percentile ranking for all 5 programs are primarily favorable, then the steps for Scenario A can be observed across the entire organization.

More often, break-out reports for different programs will reflect different findings. In that instance, the status of each break-out should be considered in light of the three possible scenarios. For example one program may reveal primarily favorable percentile rankings. That program would then follow the recommendations for Scenario A. Another program might reveal percentile rankings that are primarily in the average range. That program would follow the steps for Scenario B. Still another program might reveal percentile rankings that are primarily unfavorable. That program would observe the Scenario C recommendations.

**User Support**

For assistance with any questions or concerns, contact help@bpsys.org or call 877-330-9870.