

# **WORKGROUP CLIMATE ASSESSMENT**

## **Guide for Facilitators**

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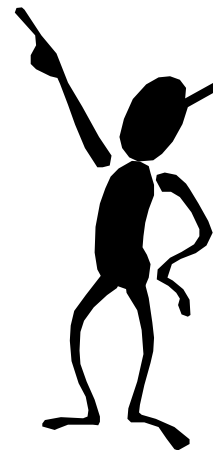
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## I. USING THE WCA GUIDE FOR FACILITATORS

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This Guide is for managers, supervisors and others who want to better understand and measure *workgroup climate*. The first part of the Guide provides an overview of climate and the Workgroup Climate Assessment (WCA) tool and explains how to use the WCA as part of an organizational improvement process. The annexes of the Guide include all the necessary materials for facilitating a short workshop to administer the WCA with a workgroup and analyze the results. Facilitators who will be using the WCA with a workgroup should read the entire Guide to become familiar with the tool, its participatory philosophy, and the steps involved in using it.

For any updates to the WCA tool or Guide, users of this Guide should refer to “Workgroup Climate Assessment” in the Leadership Development section of The Health Manager’s Toolkit at <http://erc.msh.org>.



## II. DEFINING AND MEASURING WORKGROUP CLIMATE

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This section of the Guide defines *workgroup climate* and describes how a workgroup can benefit from using the WCA tool as a basis for discussing and improving their climate.

### a. What is a workgroup?

A **workgroup** is a group of people who work together on a routine basis toward the same project goal or outcome. Members of the workgroup may work in the same physical site or in separate locations. Throughout this manual, the terms “workgroup” and “team” are used interchangeably and mean the same thing.

### b. What is Workgroup Climate?

**POINT #1: Workgroup Climate is the prevailing workplace atmosphere as experienced by employees. It is what it *feels* like to work together in a group.**

Every organization and every workgroup has a climate. Climate is the environment in which people work that affects how people behave at work. The climate of an individual workgroup may be similar to or different from the overall organizational climate. For example, high-performing workgroups sometimes operate in organizations troubled by declining funding or weak leadership at the senior level.

“The practices and behaviors of the workgroup manager and staff influence their climate.”



Workgroup climate is influenced by external and internal factors. Most external factors are beyond the control of the workgroup and include the organization’s history and culture, organizational strategies and structures, and the external environment. On the other hand, what happens **inside** the workgroup can be usually be controlled. The practices and competencies of the manager influence workgroup climate more than any other factor. At the same time, workgroup staff also contributes to creating and maintaining positive climate. As a result, the leading and managing practices used by all members of a workgroup can create a positive work climate, even if the organization’s overall climate is poor.

### c. Why is workgroup climate important?

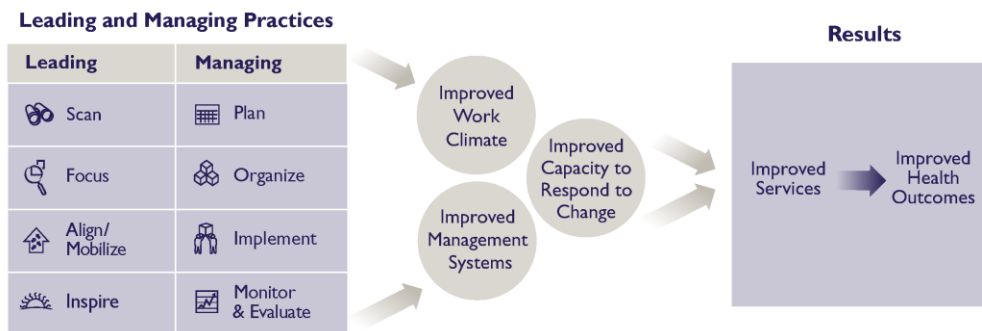
Workgroup climate influences results. Workgroups with a positive, supportive climate tend to perform well and to achieve their desired results. For example, a study involving Canadian staff nurses showed that positive workgroup climate created an environment that encouraged the development of trust and empowerment among the nursing staff, which in turn led to higher quality patient care (Laschinger et al. 2001 p19).

**POINT #2: Workgroup climate affects results. Workgroups with a positive, supportive climate tend to perform well and to achieve their desired results.**

Positive workgroup climate motivates employees to improve their performance by going above and beyond job expectations. Better performing workgroups contribute to better organizational performance, which in turn leads to better results. In the health sector, these results are improved service delivery and ultimately improved health outcomes. The links between the practices used by teams and managers and their results are shown in the Leading and Managing for Results Model of the MSH Management and Leadership Program (M&L).

#### Leading and Managing for Results Model

How do management and leadership contribute to improved service delivery?

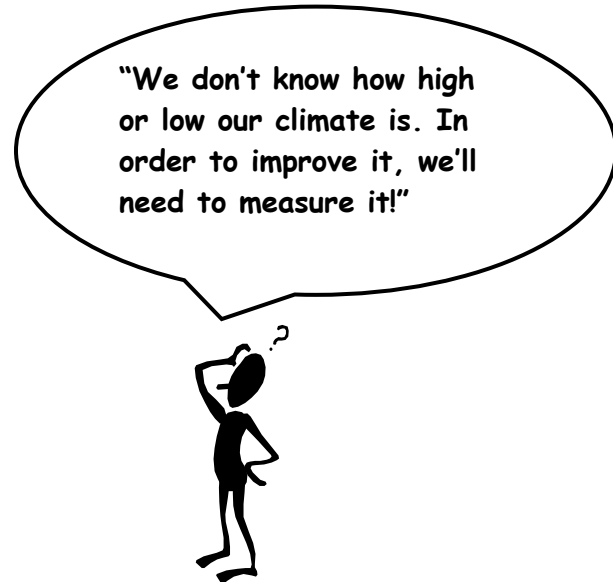


Managers and teams that apply the eight leading and managing practices listed on the left of the model can bring about changes in work climate, management systems (structures, processes, and procedures used in organizations), and the capacity to respond to changing conditions in the internal or external environment. All three contribute to overall desired results of improved services and health outcomes.

#### d. How can we improve our workgroup climate?

Workgroup climate is influenced by the leading and managing practices of the workgroup manager and workgroup members. Improving these practices will likely improve workgroup climate.

One of the best ways to improve something is to start by measuring it. The workgroup can measure its own climate using a short survey called the **Workgroup Climate Assessment (WCA)**. After using the WCA, the group can discuss what the survey results mean and brainstorm ways they can work to improve their climate.



#### e. What is the Workgroup Climate Assessment (WCA)?

The WCA is a simple, reliable, and validated tool designed to measure climate in intact workgroups at all levels of an organization. In a Ministry of Health, this includes workgroups or teams at the local (clinic) level all the way up to workgroups at the central level. For a nongovernmental organization (NGO) this includes technical and administrative teams as well as the executive management teams. The WCA is not appropriate for teams that are newly formed because they do not have a history of working together and therefore team members will find it difficult to respond to the items in the survey.

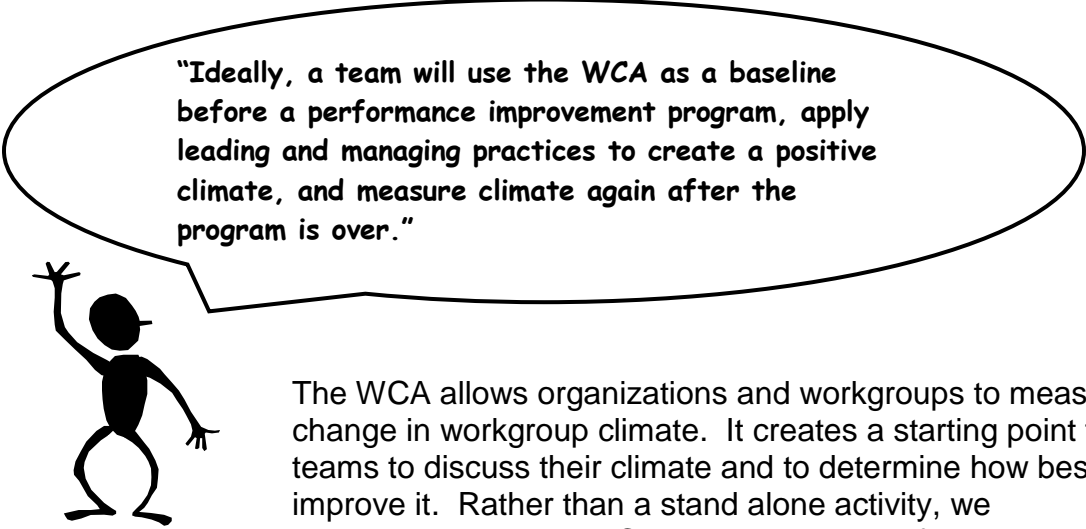
**POINT #3: The WCA is designed for intact workgroups at all administrative levels. Workgroup climate is measured according to the perceptions of the individual workgroup members.**

Workgroup Climate is measured according to the perceptions of the individual workgroup members. The WCA consists of eight climate perceptions which, together, measure the group's climate. The tool also has two additional items that capture perceptions of productivity and quality within the workgroup. The climate items were carefully selected and tested by MSH. The tool was then validated with teams from different administrative levels in three countries to ensure it measures climate across gender, culture and language.

MSH developed the WCA for use in public health organizations. The primary use of the WCA is to measure workgroup climate. Its secondary purpose is to engage workgroup members in a conversation about their particular climate so

that together, they can find ways to improve it. The WCA encourages a participatory process – team members individually respond to the survey and afterwards they are encouraged to discuss and act upon the results together.

**f. Why should the WCA be part of a performance improvement process?**



**"Ideally, a team will use the WCA as a baseline before a performance improvement program, apply leading and managing practices to create a positive climate, and measure climate again after the program is over."**

The WCA allows organizations and workgroups to measure change in workgroup climate. It creates a starting point for teams to discuss their climate and to determine how best to improve it. Rather than a stand alone activity, we recommend that the WCA be used as part of a larger program for performance improvement. The results of the WCA provide a foundation for improving climate and the larger program – like leadership development – gives the support to make the necessary changes. The WCA allows teams to measure changes in their climate from the beginning to the end of the program.

For example, the WCA is often used as a baseline and follow-up measure with the leadership development program developed by M&L. Participants in this program work in teams and use leading and managing practices to address the challenges they face in their unit or organization. As they learn to adopt new practices and to overcome their challenge as a team, they create a positive climate that supports staff motivation. Our experience from several countries shows that this type of program often leads to improved workgroup climate.

How does the WCA fit into such a process? At the beginning of the intervention or program, all team members rate the survey items according to how they feel about each item at that moment. These pre-intervention scores provide the *baseline* which the team can use to identify strategies for improving their climate. When discussing the baseline results, the group can decide how it wants to work together in the future to create a more positive climate. The role of the workgroup manager is to support the team in making a commitment to a new work climate and to provide the direction to make needed changes.



At the conclusion of the intervention, the survey is applied again among all team members. Respondents rate the items according to how they feel about them after the intervention is over. The post-intervention scores are compared to the baseline scores to determine the amount of progress the team has made in working together to change their climate.

### **g. How do we use the WCA?**

The WCA is designed to be completed by all members of a workgroup. It is a self-scorable questionnaire which means that everyone in the workgroup will be given a copy to fill out on his or her own. All members of the workgroup (both managerial and staff) respond to the survey individually and confidentially – no names will appear on any of the surveys nor any of the results.

**POINT #4: All WCA surveys are kept confidential so no one can know how others have responded to the survey items. No names are used on the surveys or on the results.**

The WCA has two sections: the first contains eight items which measure perceptions of climate and the second contains two items which measure perceptions of the workgroup's quality and productivity. The items are:

#### Section A: Climate Perceptions

1. We feel our work is important.
2. We strive to achieve successful outcomes.
3. We have a plan which guides our activities.
4. We pay attention to how well we are working together.
5. We understand each other's capabilities.
6. We seek to understand the needs of our clients.
7. We understand the relevance of the job of each member in our group.
8. We take pride in our work.

#### Section B: Perceptions of Productivity and Quality

9. Our workgroup is known for its quality work.
10. Our workgroup is productive.

To complete the survey, each team member rates the 10 items in the survey according to how he/she feels about each item. Team members should ask themselves: "how well does each item describe our workgroup today?" They should record their responses using a scale of 1 to 5 where:

- 1 = Not at All
- 2 = To a Small Degree
- 3 = To a Moderate Degree
- 4 = To a Great Degree
- 5 = To a Very Great Degree

The best way to apply the WCA is to have someone from outside the workgroup – an independent facilitator – guide the process of collecting and analyzing the data to maintain the confidentiality of group members' responses.

**POINT #5: The facilitator can be either someone who works within or outside the organization, but should be someone whom the staff trusts, so they are more likely to respond honestly.**

All completed surveys should be collected by the facilitator and placed in an envelope to ensure confidentiality. After all team members have filled out the survey, the scores for the 8 climate items are tabulated and average results for each individual are calculated, as well as an overall average climate score for the team as a whole. Results for items 9 and 10 are calculated separately. All materials for applying the survey and tabulating results are included in the annexes of this guide.

#### **h. How can we use the WCA with the rest of our workgroup?**

To obtain a valid measure of workgroup climate, it is necessary for all members of the workgroup to fill out the WCA. If only a few workgroup members participate in the WCA workshop (explained below), one of these participants must volunteer to distribute the WCA to all remaining members of the workgroup. This person serves as the WCA representative.

**POINT #6: To obtain a valid measure of workgroup climate, all members of the workgroup should fill out the WCA.**

Before distributing the survey, the representative should review why the group is measuring climate and how to use the survey. Annex 5 provides simple instructions for representatives applying the WCA with their workgroup. The representative should make sure that each workgroup member fills out the survey privately. When collecting the completed WCAs, the representative should place them in an envelope to make it clear the survey is anonymous. The envelope should be sealed and returned to the WCA facilitator. The facilitator will then tabulate the survey results and give the representative a chart of the full workgroup's results to bring back to the members for discussion.

### III. FACILITATING THE WCA PROCESS

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The WCA Process consists of 4 phases:

**Phase 1:** Engaging the Stakeholder – Would measuring the Workgroup climate be beneficial to the group?

**Phase 2:** Preparing the Mini-Workshop – Participation and facilitator preparations including logistics and buy-in from stakeholders.

**Phase 3:** Conducting the WCA Mini-Workshop – The foundation of the WCA is a half-day workshop with members of the workgroup when climate is discussed and the tool is applied.

**Phase 4:** Follow Up – What next? How do the findings from the WCA connect to a performance improvement process?

#### a. Phase 1: Engaging the Stakeholder

Would measuring the Workgroup Climate be beneficial to the group? The first step is to determine if the WCA is appropriate for the particular workgroup at a particular time. It is especially important to consider the following issues:

- Since using the WCA may spark discussions about workgroup climate, it is important to determine if the workgroup would be open to having that discussion, and if the issues that may come out are within or beyond the control of the workgroup or manager. For example, if a workgroup works well together, but their overall morale is poor because they are not paid on time, a conversation about workgroup climate may lead to more frustration since they cannot control their organization's payment methods or lack of set schedule.
- If the workgroup manager is not open to having an honest discussion about climate, it may be difficult for workgroup members to feel comfortable completing such an exercise. The exercise must be completed with honesty and openness in order for it to be useful to a workgroup.

Once you have determined that measuring the workgroup climate would benefit the group, it is time to prepare all of the logistics in Phase 2.

## **b. Phase 2: Preparing WCA Mini-Workshop**

The objective of this phase is to prepare the logistics for implementing the WCA so that it runs smoothly. This includes everything from securing adequate meeting space to your own preparation as the facilitator.

Logistics:

- Identify the workgroup that will complete the WCA.
- Identify an adequate meeting space for conducting the ½ day workshop.
- Determine the number of workgroup members and send invitations (a minimum of three participants is necessary to ensure confidentiality and the validity of assessment results).
- Determine when the WCA will be applied. Ideally, the WCA would be applied as a baseline before an organizational improvement process is undertaken. It is then ideal to apply it again after the intervention has been completed in order to measure any changes in climate.

**IMPORTANT:** if it is not possible for the entire workgroup to be present for the administration of the assessment during the ½ day workshop, the facilitator and workgroup must agree upon a way to collect completed WCAs from members who are not present. The best option may be to send copies of the WCA to the missing workgroup members with explicit instructions about its return. **If using this option:**

- Print an adequate number of assessments.
- Edit the survey instructions to include the return date, the return instructions to the appropriate location and any other relevant instructions.
- Prepare the envelopes, including a return address label if not being returned in person.
- Pack the materials: Assessment, Pre-labeled return envelope.
- Ship packets.

Workshop preparation:

- Prepare the necessary materials for the workshop, including two flip charts for Module 1: “*What is Workgroup Climate?*” and “*How is Workgroup Climate influenced?*” (See steps 1 and 3 in Module 1).
- Use the facilitator plan to help you organize each workshop session to ensure you are fully prepared.
- Review background material on workgroup climate (as necessary) and review the material for the follow up discussion after the results of the WCA are tabulated.
- Review the participant list and any final logistics.

### c. Phase 3: Conducting the WCA Mini-Workshop

The foundation of the WCA is a half-day (less than four hours) workshop with members of the workgroup when climate is discussed and the tool is applied. The role of the facilitator in the workshop is to introduce and explain workgroup climate to the group, manage the assessment including distributing and collecting completed surveys, analyze the data, and produce the feedback report. The facilitator also acts as a resource to members of the workgroup who have questions about the survey or the process for completing it. In the annexes of this guide are all the materials the facilitator will need for each of these tasks.

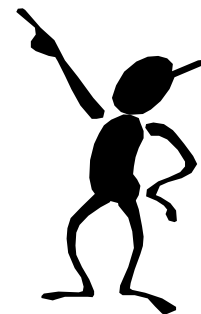
The WCA workshop consists of four modules outlined below. These modules are fully described in the Facilitator's Plan section of this Guide (Section V).

- Module I: What is Workgroup climate? Why measure it?
- Module II: Instructions and Application of the WCA
- Module III: Results tabulations
- Module IVa and IVb: Follow-up discussion (baseline and follow-up)

### d. Phase 4: Follow Up

**"Once the group measures its climate, the manager and staff can work together on using management and leadership practices to improve climate. They can reapply the WCA periodically to measure their progress in working together as a team, ideally with the support of a performance improvement process."**

What next? How do the findings of the WCA connect to a performance improvement process? Assessing workgroup climate provides insight into group members' perceptions of what it feels like to work in their team. The group and their manager can discuss the results and choose specific actions to carry out with the intention of improving climate. Some examples of actions related to leading and managing practices are presented in Annex 2.



The use of the WCA often sparks conversations and reflections among workgroup members about their climate and how this affects their group performance and the performance of the organization as a whole. Therefore, connecting the WCA to a larger performance improvement process gives the

team the tools and support to make the necessary changes in order to improve their climate. This way teams can work on concrete challenges while creating a positive climate. The team should use the WCA as a monitoring tool by applying it as a baseline survey before the intervention and then repeating it at a later time to assess their progress and needs for additional support. Applying the WCA before and after an intervention allows a workgroup to track changes in their climate and determine how well the team has worked together to change its climate.

## **IV. IDENTIFYING ROLES OF THE KEY STAKEHOLDERS**

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### **The Facilitator**

- Can be someone from inside the same organization, but not a member of the workgroup to whom the WCA will be applied.
- Presents the WCA to key stakeholders to ensure that it is being implemented as part of larger organizational improvement process.
- Communicates to stakeholders about what the WCA will and will not accomplish.
- Prepares the survey materials for distribution at the workshop.
- Facilitates WCA workshop.
- Interprets results and facilitates a discussion with the group about what the results mean and how to act on the findings.

### **The Workgroup Manager**

- Agrees to open participation and commitment when completing the tool, interpreting the results, and acting on the findings.

### **The Workgroup Participants**

- Agrees to open participation and commitment when completing the tool, interpreting the results, and acting on the findings.

## V. CONDUCTING THE WCA MINI-WORKSHOP: FACILITATOR'S PLAN

Overview of Module Content				
Module	Purpose	Objectives	Timing	Handouts
<u>Module I:</u> Introducing the WCA	To introduce the concept of Workgroup Climate and the WCA instrument to a workgroup.	By the end of this activity, participants will: <ul style="list-style-type: none"> <li>• Understand the role of the WCA within the larger framework of an organizational improvement process</li> <li>• Recognize the different elements that make up a positive workgroup climate</li> <li>• Understand how the workgroup climate impacts performance</li> <li>• Understand how the workgroup members can affect the workgroup climate through their leading and managing practices</li> <li>• Understand the elements of the WCA tool</li> </ul>	1 hour, 10 minutes	Discussion guide #1: Introduction to the WCA
<u>Module II:</u> Applying the WCA Tool	To explain to workgroup members how to fill out the WCA and to have workgroup members complete it successfully and confidentially.	By the end of this activity, participants will: <ul style="list-style-type: none"> <li>• Understand how to complete the WCA</li> <li>• Fill out the WCA</li> </ul>	45 minutes	No
<u>Module III:</u> Tabulations	To confidentially tabulate the results of the WCAs for the participants.	By the end of this activity, the facilitator will: <ul style="list-style-type: none"> <li>• Tabulate the WCA results and prepare a Feedback Report for participants</li> <li>• Participants will have a 30-45 minute break</li> </ul>	30-45 minutes	No
<u>Module IVa:</u> Results and Follow-Up Discussion of Pre-Intervention Application	To discuss the WCA results with the workgroup and identify ways to improve climate.	By the end of this activity, participants will: <ul style="list-style-type: none"> <li>• Receive WCA results</li> <li>• Discuss results</li> </ul>	1 hour	Discussion guide #2: Pre-intervention Application of the WCA
<u>Module IVb:</u> Results and Follow-Up Discussion of Post-Intervention Application	To discuss the results of the WCA with the workgroup and to compare pre- and post-intervention results.	By the end of this activity, participants will: <ul style="list-style-type: none"> <li>• Receive WCA results</li> <li>• Discuss results and compare these to results received at the first application of the tool.</li> </ul>	1 hour	Discussion guide #3: Post-intervention Application of the WCA





Time	Activity	Resources
	<ul style="list-style-type: none"> <li>Share and discuss the flipchart entitled “<i>What is Workgroup Climate?</i>”</li> </ul>	<p>prevailing workplace atmosphere as experienced by employees. It is what it <i>feels</i> like to work in a group. Climate is measured according to the perceptions of the workgroup members.</p>
20 minutes	<p><b>Step 2.</b></p> <ul style="list-style-type: none"> <li>Have participants organize themselves into small groups (3-4 persons per group)</li> <li>Ask the participants to list what they think are the characteristics of a positive workgroup that achieve results and the characteristics of a negative workgroup that does not get anything done. <ul style="list-style-type: none"> <li>Think about the workgroup members’ <b>behaviors and actions</b>—how do they contribute to the positive or negative characteristics?</li> </ul> </li> <li>Small groups report out to the larger group</li> <li>Compile all characteristics from groups on a flipchart</li> <li>Next, on a flipchart entitled “<i>How is Workgroup Climate influenced?</i>” present them with this list of factors on a flipchart: <ul style="list-style-type: none"> <li>External issues</li> <li>Historical forces</li> <li>Organizational arrangements</li> <li>Strategy</li> <li>Leading and Managing practices</li> </ul> </li> <li>In plenary, discuss: Which factors are in control of the workgroup members?</li> <li>In plenary, review the general characteristics of a positive and negative workgroup. Discuss how the leading and managing practices affect the workgroup and its climate.</li> </ul>	<p>Positive workgroups are characterized by: clarity, support, and challenge.</p> <p>Negative workgroups are characterized by: confusion, rigidity, and a lack of trust.</p> <p>Flipchart with: <i>How is Workgroup Climate influenced?</i></p> <ul style="list-style-type: none"> <li>* external issues</li> <li>* historical forces</li> <li>* organizational arrangements</li> <li>* strategy</li> <li>* leading and managing practices</li> </ul> <p>IMPORTANT: Leading and managing practices are the only items within the control of the workgroup members.</p>
25 minutes	<p><b>Step 3.</b></p> <ul style="list-style-type: none"> <li>Provide background and context for workgroup climate and its connection to improved organizational performance.</li> <li>Improving climate for its own sake will not impact the performance of the organization. Improving climate must be in the context of a larger organizational improvement for it to have real impact. (Example could be a leadership development program.)</li> <li>Have participants return to their small groups. Ask participants to review the Leading and Managing for Results Model and the handouts from <i>Managers Who Lead</i>.</li> </ul>	<p>Copies of the Leading and Managing for Results Model</p> <p>Copies of handouts using material from Chapter 3 of <i>Managers Who Lead</i></p>

Time	Activity	Resources
	<ul style="list-style-type: none"> <li>○ Given what you know now about the characteristics that make up a positive workgroup, how does workgroup climate fit within the larger picture of achieving results and improved organizational performance?</li> <li>● Small groups report out to the larger group</li> <li>● Compile all characteristics from groups on a flipchart</li> <li>● In plenary, facilitate the following discussion: <ul style="list-style-type: none"> <li>○ Why are we going to implement the WCA today? What is happening in the organization that will be influenced by what we learn?</li> <li>○ Review the ideal conditions in which to conduct the assessment: <ul style="list-style-type: none"> <li>▪ Conducted by someone “outside” the workgroup to maintain objectivity</li> <li>▪ The facilitator of the tool has read guide, tool, and related materials to help facilitate a discussion about the results</li> <li>▪ Confidentiality is maintained</li> <li>▪ The WCA is used to measure climate before and after an organizational improvement process is implemented.</li> </ul> </li> </ul> </li> </ul>	
5 minutes	<p><b>Summary</b></p> <ul style="list-style-type: none"> <li>● In plenary ask for any questions: Before we proceed with the instructions of completing the instrument, are there any questions?</li> </ul>	

**Module II: Applying the WCA Tool  
(Pre- and Post-Intervention Application)**

**Purpose:** To explain to workgroup members how to fill out the WCA and to have workgroup members complete it successfully and confidentially.

**Objectives:** By the end of this exercise, participants will:

- Understand how to complete the WCA
- Fill out the WCA

**\*An important note about confidentiality:** To ensure confidentiality of the feedback process, the workgroup needs to have at least three members. Five or more is optimal. The facilitator should encourage staff to be open in their answers in order to benefit the most from this process. To do this, the facilitator should stress that:

- Answers are anonymous and confidential.
- A feedback report will be produced only when **three or more** members from the group complete the assessment. The feedback report will not label any individual’s responses with their names.
- The usefulness of the assessment depends entirely on the frankness and honesty of the responses.

**Timing: 45 minutes**

Time	Activity	Resources	Notes
15 minutes	<p><b>Step 1.</b> Explain to the group that they are going to fill out the Assessment.</p> <p>Present (show) the WCA and sample question on a flip chart. Using the sample questions, explain the scale that is used to score the items.</p>	<p>Flip chart with sample questions written on it (sample question should be taken from the first page of the tool): Example: “I feel that in my workgroup... We have a positive attitude.”</p>	<p>Emphasize that they are to rate the survey items according to how they feel about each one. As they read the items, each person should ask him/herself: “How are things now in our workgroup? How well does the item</p>

Time	Activity	Resources	Notes
	<p>Once everyone is clear about the scale, distribute the tool and ask each participant to fill it out <b>on their own</b>. Ensure that each person has sufficient privacy to complete the tool on his/her own.</p> <p>If the workgroup will not be filling it out during the session, explain to them how to return it to you.</p>	<p>Copies of the WCA tool for each participant.</p> <p>Hand out large envelopes if the participants will be completing the tool off-site and will need to return the responses to the facilitator.</p>	<p>describe our workgroup?" They respond using the scale:</p> <p>1 = Not at All  2 = To a Small Degree  3 = To a Moderate Degree  4 = To a Great Degree  5 = To a Very Great Degree</p> <p>The facilitator should emphasize that responses are <i>confidential</i> and will not be shared in a way that indicates their identity to other members of the team. Remind them NOT to put their name on the assessment. Explain that in order for the process to be as worthwhile as possible, the participants should be as honest as possible in their responses to the assessment.</p>
25 minutes	<p><b>Step 2.</b>  Participants fill out the WCA on their own (they should not confer with each other). Ensure that each member of the workgroup has sufficient time to read the assessment tool, consider the items and complete it.</p>	A copy of the WCA for each participant.	This step may take less than 45 minutes, but leave this much time in case the group members need more clarification than what the facilitator gave them during the introduction. The facilitator should be available to answer any questions the workgroup members may have when filling out the Assessment.
5 minutes	<p><b>Step 3.</b>  Collect completed WCAs, placing them in a large envelope. The facilitator should have a completed WCA for each member of the workgroup.</p>	Large envelope to collect and store guides.	<p><b>IMPORTANT: For a post-intervention application, the facilitator must ensure that ALL of the original respondents completed a post-intervention assessment.</b></p>

### **Module III: Tabulations**

**Purpose:** The facilitator confidentially tabulates the results of the WCAs for the participants.

**Objective:** By the end of this activity, the facilitator will:

- Tabulate the WCA results and prepare a Feedback Report for participants
- Participants will have a 30-45 minute break

**Timing: 30-45 minutes**

Time	Activity	Resources	Notes
30-45 minutes	<p><b>Step 1.</b> Prepare a Feedback Report</p> <p>The participants can have a 30-minute break while the facilitator tabulates the results away from the workgroup.</p> <p>If this is a post-intervention application, the facilitator should also have enough copies of the pre-intervention WCA chart and graph for each member of the workgroup.</p>	<p>WCA Score sheet (please see Annex 4)</p> <p><u>Post-intervention application:</u> Copies of the pre- and post-intervention chart and graph for each workgroup member.</p>	<p>This process should be done by the facilitator in private. It is a good time for the participants to have a coffee break or attend to other work. The facilitator should complete this entire activity before presenting back to the group.</p> <p>The facilitator will take the collected WCA responses and enter the information into the excel score sheet. This score sheet has three tabs, "Tabulations," "Feedback chart (for teams)," and "Feedback graph (for teams)." The facilitator should prepare the feedback chart and graph for the participants. The facilitator should NOT share the information from the "Tabulations" sheet with any members of the workgroup.</p> <p>The graph visually represents the perceived climates. Each team member is only labeled as "Team member 1, 2, etc" to maintain confidentiality. Upon completion of the post-intervention WCA application, the overall pre- and post-intervention graphs of the workgroup results can be compared to see if there were</p>

Time	Activity	Resources	Notes
			<p>perceived changes in workgroup climate. This can be followed-up with discussion.</p> <p>Please see the instructions in the “directions” tab of the WCA score sheet, included in Annex 4.</p>

## Module IVa: Results and Follow-Up Discussion of Pre-Intervention Application

**Purpose:** To discuss the results of the WCA with the workgroup and to identify ways to improve Workgroup Climate levels.

**Objectives:** By the end of this exercise, participants will:

- Receive WCA results
- Discuss results and brainstorm ways to improve climate levels

**Timing: 1 hour**

Time	Activity	Resources	Notes
5 minutes	<b>Step 1.</b> Presentation of WCA Results to the Group	Copies of the Feedback chart and graph for each workgroup member.	Before presenting the findings to the group, the facilitator should reinforce the purpose of this assessment and the validity of seeing the score as an integrated response rather than individual responses. The facilitator should present only the summary information in the score-sheets, and never the raw scores for each item. The raw scores should remain confidential. When the facilitator has done so, the following discussion can be introduced.
55 minutes	<b>Step 2.</b> WCA Results Discussion  The facilitator may pose questions in discussion guide #1 to interpret the workgroup climate results.	Discussion Guide #2: Pre-intervention Application of the WCA Discussion	On the next page, please see Discussion Guide #2: Pre-intervention Application of the WCA Discussion (Participants' handout of this guide is in Annex 3.)

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\* The score is generated as an average per individual in the group rather than by item because in the validation of the WCA, it was found that individuals view climate as a whole and not as separate items. Averaging the score by individual and then viewing climate as a composite of these individual averages more accurately reflects a team's perception of workgroup climate.

## **Discussion Guide #2: Pre-intervention Application of the WCA Discussion:**

The facilitator may pose the following questions for interpreting the workgroup climate results:

Activity	Discussion Points	Notes
<p><b>Activity 1: Looking at similarities and differences within the team:</b></p> <p>Study the graph showing the team climate profile.</p>	<p>The facilitator can ask the group to look at their feedback graph together. After reviewing the graph, ask the group to decide whether the line is uniformly high, uniformly low or up and down. Then, pose the following questions:</p> <p><b>If the graph is...</b></p> <p><b>Uniformly high:</b></p> <ul style="list-style-type: none"> <li>• Does everyone perceive climate the same way (at the same level)?</li> <li>• Are these realistic scores – did team members feel they had to assign high values?</li> </ul> <p><b>Uniformly low:</b></p> <ul style="list-style-type: none"> <li>• Does everyone perceive climate the same way (at the same level)?</li> <li>• Are there forces beyond your control that affect your climate and are keeping it low?</li> </ul> <p><b>Up and down:</b></p> <ul style="list-style-type: none"> <li>• Why do some team members answer low and others high?</li> <li>• What are the causes of the lower or higher scores in your team profile?</li> <li>• What do you think are the main causes of the differences (or the similarities) among the individual scores within the team?</li> </ul>	<p>Remind the workgroup to focus on the trends in the graph of the individuals' average scores. It is not about individual scores; it is about viewing the graph as a whole snapshot of the groups perception of Workgroup Climate.</p> <p>Pass out Discussion Guide #2 ((Annex 3)</p>
<p><b>Activity 2: Setting goals:</b></p> <p>Once the team has brainstormed possible causes of the differences</p>	<p>The climate assessment provides a workgroup with an opportunity to sit together and discuss how they work together. Help the group identify two or three items to focus upon to help improve workgroup climate. The facilitator may pose questions that pertain to the following areas:</p>	<p>The facilitator plays a key role in the facilitation of this discussion. If it is clear from the conversation that the workgroup would benefit from some concrete suggestions or actions that they can immediately apply to improve workgroup climate,</p>



Activity	Discussion Points	Notes
<p>(or similarities) within your team, study your <u>overall climate score</u> in the same graph and set goals to improve climate.</p>	<ul style="list-style-type: none"> <li>• What can be done about the differences (or the similarities) among the individual scores within the team? For example, if in the group's discussion they decide that some lower climate scores are because not everyone on the team can participate equally in meetings, then they can come up with a strategy to address this issue. These are strategies that can be applied right away.</li> </ul>	<p>there is a summary of some of these leading and managing practices in Annex 2 of this guide. The facilitator can continue the conversation by making copies of this chart and posing the following questions to participants:</p> <ul style="list-style-type: none"> <li>• “To help with identify ways to improve your climate, look at the practices described in this chart. To what degree as a team do you engage or implement these practices? Is the team weaker in some areas than in others? Are there discrete actions there that you can apply right away that may impact your workgroup's climate? As you continue through your organizational improvement process, keep these practices in mind.”</li> </ul>

## **Module IVb: Results and Follow-Up Discussion of Post-Intervention Application**

**Purpose:** To discuss the results of the WCA with the workgroup and to compare pre- and post-intervention results.

**Objectives:** By the end of this exercise, participants will:

- Receive WCA results
- Discuss results and compare these to the results they received at the first application of the tool.
- Discuss management and leadership practices and actions and any other factors that may have affected the change in climate levels.

**Timing: 1 hour**

Time	Activity	Resources	Notes
5 minutes	<b>Step 1.</b> Presentation of WCA Results to the Group	Copies of the Feedback chart and graph for each workgroup member. Remember to include pre-intervention data and post-intervention data.	Before presenting the findings to the group, the facilitator should reinforce the purpose of this assessment and the validity of seeing the score as an integrated response rather than individual responses. <sup>†</sup> The facilitator should present only the summary information in the score-sheets, and never the raw scores for each item. The raw scores should remain confidential. When the facilitator has done so, the following discussion can be introduced.
55 minutes	<b>Step 2.</b> WCA Results Discussion  The facilitator may pose questions in discussion guide #2 to interpret the workgroup climate results.	Discussion Guide #3: Post-intervention Application of the WCA Discussion	On the next page, please see Discussion Guide #3: Post-intervention Application of the WCA Discussion (Participants' handout of this handout is in Annex 3)

<sup>†</sup> Scores are calculated as an average per individual rather than an average by item. In the validation of the WCA, it was found that individuals view climate as a whole and not as separate items. Averaging the score by individual and then viewing climate as a composite of these individual averages more accurately reflects a team's perception of workgroup climate.

### **Discussion Guide #3: Post-intervention Application of the WCA Discussion:**

The facilitator may pose the following questions for interpreting the post-intervention workgroup climate results:

Activity	Discussion Points	Notes
<p><b>Activity 1: Looking at similarities and differences within the team:</b></p> <p>Study the graph showing the team climate profile.</p>	<p>The facilitator can ask the group to look at their feedback graph together. After reviewing the graph, ask the group to decide whether the line is uniformly high, uniformly low or up and down. Then, pose the following questions:</p> <p><b>If the graph is...</b></p> <p><b>Uniformly high:</b></p> <ul style="list-style-type: none"> <li>• Does everyone perceive climate the same way (at the same level)?</li> <li>• Are these realistic scores – did team members feel they had to assign high values?</li> <li>• Have scores increased or decreased since the first application of the WCA?</li> </ul> <p><b>Uniformly low:</b></p> <ul style="list-style-type: none"> <li>• Does everyone perceive climate the same way (at the same level)?</li> <li>• Are there forces beyond your control that affect your climate and are keeping it low?</li> <li>• Have scores increased or decreased since the first application of the tool?</li> </ul> <p><b>Up and down:</b></p> <ul style="list-style-type: none"> <li>• Why do some team members answer low and others high?</li> <li>• What are the causes of the lower or higher scores in your team profile?</li> <li>• What do you think are the main causes of the differences (or the similarities) among the individual scores within the team?</li> </ul>	<p>Pass out Discussion Guide #3 (from Annex 3)</p>
<p><b>Activity 2: Comparing your post-intervention results to your pre-</b></p>	<ul style="list-style-type: none"> <li>• Have the scores changed? Why do you think so?</li> <li>• What can have you done about this? During the pre-intervention discussion of your scores you determined actions you could take within</li> </ul>	<p>The facilitator should explain that scores that decrease are a common phenomenon and that it does not necessarily indicate that</p>

Activity	Discussion Points	Notes
<p><b>intervention results:</b></p> <p>Look at the graph results for pre- and post-intervention.</p>	<p>your workgroup throughout the intervention that could improve workgroup climate (for example, increasing individual participation in meetings). Were you able to carry out these actions?</p> <ul style="list-style-type: none"> <li>• What did you learn during the intervention that you feel has changed your workgroup's climate? Why do you think this happened?</li> </ul>	<p>Climate has worsened. It is sometimes an indication that members of a workgroup have set higher standards for the group post-intervention and have therefore scored the items lower, or they have a better idea of what the elements on the survey mean and are scoring them more realistically. If post-intervention scores are lower, the facilitator should open a discussion about reasons for this decline.</p>

## **VI. ANNEXES**

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## **ANNEX 1 – Detailed Review of Workgroup Climate**

### **Review of selected Organizational Climate literature**

Tagiuri (1968 p27) defines Organizational Climate as a “relatively enduring quality of the internal environment of an organization that (a) is experienced by its members, (b) influences their behavior and (c) can be described in terms of the values of a particular set of characteristics (or attributes) of the organization.” A more recent definition refers to climate as a series of shared perceptions of the “fundamental elements” of an organization. (West 1998).

Stringer (2002) envisages climate as a subset of organizational culture. Whereas culture applies to the deeply rooted value systems inherent in all organizations, climate can be described in a broadly applicable set of dimensions, which can be manipulated. He describes how organizational strategy, the external environment, organizational arrangements and historical forces all impact the context and the milieu a workgroup operates within. While these “cultural” influences develop outside the workgroup and are beyond the direct control of the workgroup manager, these influences are seen as impacting upon the workgroup. Consequently, climate does not exist independently of the culture of an organization. This perspective is reinforced by Denison. He defines climate as “being rooted in the organization’s value system, but tends to present these social environments in relatively static terms, describing them in terms of a fixed (and broadly applicable) set of dimensions.” (1996, page 5).

Burke acknowledges the relationship between culture and climate in a series of papers that discuss the modification of organizational culture at British Airways (1993, Goodstein and Burke, 1991). This modification was achieved through the implementation of activities that focused on improving organizational climate (1993). Burke posits that changes to climate are more achievable than changes in culture, as climate is associated with the “transactional level of human behavior – the everyday interactions and exchanges” (1993, p127).

Burke (1993) stresses that leadership, mission and strategy, and organizational culture have an organization wide focus, whereas climate is experienced and created in the workgroup. Managerial styles and practices, the structure of the workgroup, and the policies and procedures mediated by the manager all influence the group’s climate.

## List of Leadership References

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Goleman, Daniel, 2000, "Leadership that Gets Results," *Harvard Business Review*, March–April 2000, p 78 – 90

Goodstein, L. and Burke, W., 1991, "Creating Successful Organizational Change," *Organizational Dynamics* 19(4): 5 – 17

Hay/McBer, 2000, *Research into Teacher Effectiveness, a Report by Hay/McBer for the Department of Education and Employment (UK) June 2000*, <http://www.teachernet.gov.uk/doc/1487/haymcbcr.doc>

Laschinger, H., Finegan, J., Shamian, J., 2001, "The Impact of Workplace Empowerment, Organizational Trust on Staff Nurses' Work Satisfaction and Organizational Commitment," *Health Care Management Review*, Volume 26, Number 3, Gaithersburg, pages 7 -23

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## ANNEX 2 – Leading and Managing Practices for Improving Workgroup Climate

Leading and Managing Practices for Improving Workgroup Climate	
8 Leading and Managing Practices	Actions
<b>Scanning</b>	<ul style="list-style-type: none"> <li>• Have conversations with clients that focus on identifying their concerns</li> <li>• Routinely analyze collected statistics to understand client needs and if they are being met</li> <li>• Gather information on the coverage and quality of your services by using varied sources (interviews, documents, observation, management information system)</li> </ul>
<b>Focusing</b>	<ul style="list-style-type: none"> <li>• Discuss and clarify the group's purpose and goals in relation to client needs and the organization's mission</li> <li>• Clarify expectations of clients, team members and the manager related to job performance and results</li> <li>• Identify key challenges that the team can address together to produce better results and meet expectations</li> </ul>
<b>Aligning and Mobilizing</b>	<ul style="list-style-type: none"> <li>• Clarify roles and responsibilities of all team members</li> <li>• Allocate resources to the activities in the team's workplan</li> <li>• As a group, take the time to learn about the skills, values, and interests of each team member. Learn what motivates each other on the job and how these things can be maximized to mobilize individual and team efforts</li> </ul>
<b>Inspiring</b>	<ul style="list-style-type: none"> <li>• As a group, set high standards for your work, and recognize when they are met</li> <li>• Let others in the organization know about your group's accomplishments</li> <li>• Frequently discuss the importance of your group's work and the impact it has on the lives of your clients</li> </ul>
<b>Planning</b>	<ul style="list-style-type: none"> <li>• Develop a work plan that clearly defines the goals of the group, activities to be completed to reach those goals and responsibilities assigned to each team member</li> <li>• Align the activities in your team's workplan with the team's overall goals and objectives</li> <li>• Hold regular meetings to exchange information on work plan progress and to share learning</li> </ul>
<b>Organizing</b>	<ul style="list-style-type: none"> <li>• Set up a system to track the group's processes, timetables, and outcomes as related to the work plan</li> <li>• Organize systems that promote information flow</li> <li>• Set reasonable deadlines for completing work activities that will lead to shared goals</li> </ul>
<b>Implementing</b>	<ul style="list-style-type: none"> <li>• Carry out workplan activities in order to move the team toward shared goals</li> <li>• Schedule regular meetings to discuss progress towards goals based on the workplan</li> <li>• As a group, continually compare current activities with stated plans for improvement</li> </ul>
<b>Monitoring and Evaluating</b>	<ul style="list-style-type: none"> <li>• As a group, set performance goals with indicators to measure performance</li> <li>• Using the indicators, assess the group's current performance against its goals and identify areas for improvement</li> <li>• Monitor progress regularly and use successes and failures as opportunities for learning</li> </ul>



## **ANNEX 3 – Handouts for Discussion Groups**

### **Discussion Guide #1: Introduction to the WCA**

#### **Activity 1:**

- Think of a time when you were a member of a workgroup that you did not like or felt it was a struggle to get anything done as a team.
  - What was it like to be a member of that workgroup?
  - What were your perceptions and feelings about the environment of that workgroup?
  - Why do you think the workgroup was unable to get anything done?
- Now think of a time when you were a member of a workgroup that you enjoyed working with and that was successful in achieving results.
  - What was it like to be a member of that workgroup?
  - What were your perceptions and feelings about the environment of that workgroup?
  - Why do you think the workgroup was able to achieve results?
- Collectively as a group define “workgroup climate”
  - What indicators do you think could be used to measure a workgroup climate that produces results?

#### **Activity 2:**

- Participants organize themselves into small groups (3-4 persons per group)
- List what you think are the characteristics of a positive workgroup that achieves results and the characteristics of a negative workgroup that does not get anything done
  - Think about the behaviors and actions of the workgroup members—how do they contribute to the positive or negative characteristics listed above?
- Small groups report out to the larger group
- Compile all characteristics from groups in plenary

#### **Activity 3:**

- In small groups, review the Leading and Managing for Results Model:
  - Given what you know now about the characteristics that make up a positive workgroup, how does WCA fit within the larger picture of achieving results and improving organizational performance?

## **Discussion Guide #2: Pre-intervention Application of the WCA**

Once every member of your team has completed the WCA, and you have received a feedback graph from the facilitator, please use the following discussion guide to facilitate your interpretation of the results:

Activity	Discussion Points	Notes
<p><b>Activity 1: Looking at similarities and differences within the team:</b></p> <p>Study the graph showing the team climate profile.</p>	<p>Look at your feedback graph together. After reviewing the graph, decide if the graph is uniformly high, uniformly low or up and down.</p> <p><b>If the graph is...</b></p> <p><b>Uniformly high:</b></p> <ul style="list-style-type: none"> <li>• Does everyone perceive climate the same way (at the same level)?</li> <li>• Are these realistic scores – did team members feel they had to assign high values?</li> </ul> <p><b>Uniformly low:</b></p> <ul style="list-style-type: none"> <li>• Does everyone perceive climate the same way (at the same level)?</li> <li>• Are there forces beyond your control that affect your climate and are keeping it low?</li> </ul> <p><b>Up and down:</b></p> <ul style="list-style-type: none"> <li>• Why do some team members answer low and others high?</li> <li>• What are the causes of lower or higher scores in your team profile?</li> <li>• What do you think are the main causes of the differences (or the similarities) among the individual scores within the team?</li> </ul>	<p>Focus on the trends in the graph of individual average scores. This analysis is not about individual scores; it is about viewing the graph as a whole snapshot of the groups' perception of workgroup climate.</p>
<p><b>Activity 2: Setting goals:</b></p> <p>Once the team has brainstormed possible causes of the differences (or similarities) within your team, study your <u>overall climate score</u> in the same graph and set goals for practices.</p>	<p>The climate assessment provides a workgroup with an opportunity to take the time to discuss how you work together. As a group, identify two or three items to focus on to help improve workgroup climate, as follows:</p> <ul style="list-style-type: none"> <li>• What can be done about the differences (or the similarities) among individual scores within the team? For example, if in the group's discussion you decide that some lower scores are because not everyone on the team can participate equally in meetings, then you can come up with a strategy to address this issue. Many strategies can be applied right away to improve climate.</li> </ul>	<p>The workgroup can use results of the WCA to determine practices that will improve climate and help to motivate people to do well. As you continue through your organizational improvement process, keep these strategies in mind.</p>

### **Discussion Guide #3: Post-intervention Application of the WCA**

Once every member of your team has completed the WCA, and you have received a feedback graph from the facilitator, please use the following discussion guide to facilitate your interpretation of the results:

Activity	Discussion Points	Notes
<p><b>Activity 1: Looking at similarities and differences within the team:</b></p> <p>Study the graph showing the team climate profile.</p>	<p>Look at your feedback graph together. After reviewing the graph, decide if the graph is uniformly high, uniformly low or up and down.</p> <p><b>If the graph is...</b></p> <p><b>Uniformly high:</b></p> <ul style="list-style-type: none"> <li>• Does everyone perceive climate the same way (at the same level)?</li> <li>• Are these realistic scores – did team members feel they had to assign high values?</li> </ul> <p><b>Uniformly low:</b></p> <ul style="list-style-type: none"> <li>• Does everyone perceive climate the same way (at the same level)?</li> <li>• Are there forces beyond your control that affect your climate and are keeping it low?</li> </ul> <p><b>Up and down:</b></p> <ul style="list-style-type: none"> <li>• Why do some team members answer low and others high?</li> <li>• What are the causes of the lower or higher scores in your team profile?</li> <li>• What do you think are the main causes of the differences (or the similarities) among the individual scores within the team?</li> </ul>	<p>Focus on the trends in the graph of the individuals' average scores. This analysis is not about individual scores; it is about viewing the graph as a whole snapshot of the groups' perception of workgroup climate.</p>
<p><b>Activity 2: Comparing your post-intervention results to your pre-intervention results:</b></p> <p>Look at the pre- and post-intervention results on the graph</p>	<ul style="list-style-type: none"> <li>• Have the scores changed? Why do you think so?</li> <li>• What can have you done about this? During the pre-intervention discussion of your scores you determined actions you could take within your workgroup throughout the intervention that could improve workgroup climate (for example, increasing individual participation in meetings). Were you able to carry out these actions?</li> <li>• What did you learn during the intervention that you feel has changed your workgroup's climate? Why do you think this happened?</li> </ul>	<p>Scores that decrease do not always indicate that the climate has worsened since the baseline. It is sometimes an indication that workgroup members have set higher standards for the group post-intervention and have therefore scored lower, or they have a better idea of what the elements on the survey mean and are scoring the items more realistically after the intervention.</p>

**ANNEX 4 – WCA Tool and Tabulation Sheets**

**Workgroup Climate Assessment (WCA)**

Management Sciences for Health  
Management & Leadership

**Please write the name of your workgroup here:** \_\_\_\_\_

INSTRUCTIONS: To complete the survey, please read each item. How do you feel about the item today? To assist you, there is a statement at the top of the survey that reads: *I feel that in my workgroup.....* Once you have made your choice, indicate your selection by circling the appropriate number in the shaded column, as demonstrated in the sample below.

Your answers are confidential. In no case will your individual responses be shared with anyone in your organization.

Here is an example of how to complete the Workgroup Climate Assessment.

<p><b>Workgroup Climate Assessment</b></p> <p><b>SAMPLE</b></p> <p><b>I feel that in my workgroup.....</b></p>	<p><b>How are things now in your workgroup?</b></p> <p>Please rate each item on a scale from 1 to 5 where:</p> <p>1 = Not at All 2 = To a Small Degree 3 = To a Moderate Degree 4 = To a Great Degree 5 = To a Very Great Degree</p>
1. We have a positive attitude	<p>1    2    <b>3</b>    4    5</p>
2. We enjoy our work	<p>1    <b>2</b>    3    4    5</p>

## Workgroup Climate Assessment - Part A

Please read each item below and indicate your selection by circling the appropriate number in the shaded column.

<b>Workgroup Climate Assessment – Part A</b>	<b>How are things now in your workgroup?</b>				
<b>I feel that in my workgroup.....</b>	<p style="color: red;">Please rate each item on a scale from 1 to 5 where:-</p> <p>1 = Not at All                  2 = To a Small Degree                  3 = To a Moderate Degree                  4 = To a Great Degree                  5 = To a Very Great Degree</p>				
1. We feel our work is important	1	2	3	4	5
2. We strive to achieve successful outcomes	1	2	3	4	5
3. We pay attention to how well we are working together	1	2	3	4	5
4. We understand the relevance of the job of each member in our group	1	2	3	4	5
5. We have a plan which guides our activities	1	2	3	4	5
6. We understand each other's capabilities	1	2	3	4	5
7. We seek to understand the needs of our clients	1	2	3	4	5
8. We take pride in our work	1	2	3	4	5

*After completing this part of the assessment, please move on to Part B found on the next page.*

## Workgroup Climate Assessment - Part B

This section is an assessment of your feelings about whether your workgroup is *known for quality work* and whether it is *productive*.

What does being *known for quality work* mean? It means that our workgroup:

- is known for meeting our clients' needs
- receives positive feedback from our clients or supervisors

What does being productive mean? It means that our workgroup:

- consistently meets our work objectives, such as monthly or annual objectives
- is recognized by others as a group that gets the job done

Please read each item and then decide how things are in your workgroup. Using the same scale as in Part A, indicate your selection by circling the appropriate number in the shaded column.

<b>Workgroup Climate Assessment – Part B</b>	<b>How are things now in your workgroup?</b>				
	Please rate each item on a scale from 1 to 5 where: 1 = Not at All 2 = To a Small Degree 3 = To a Moderate Degree 4 = To a Great Degree 5 = To a Very Great Degree				
<b>I feel that .....</b>	<b>1</b>	<b>2</b>	<b>3</b>	<b>4</b>	<b>5</b>
9. Our workgroup is known for quality work	1	2	3	4	5
10. Our workgroup is productive	1	2	3	4	5

**Thank you for completing the assessment.**

# Tabulation Instructions

## Instructions for Facilitators using the Tabulations Workbook in Excel

### Tabulations

1. Input the score for each item, moving horizontally across the chart for each team member. The chart will automatically calculate the average per team member.
2. Do the same for the two items on productivity and quality.
3. DO NOT print out this sheet for the workgroup members.

### Feedback Chart (for teams)

1. Once all of the necessary data has been input in the tabulations sheet, the "Feedback Chart (for teams)" automatically reflects the averages calculated in the Tabulations section.
2. Once this form is completed (which can be done simply by filling out the Tabulations sheet), print this sheet for the workgroup participants. Print one copy per person.

### Feedback Graph (for teams)

1. This graph should also be generated by the data input into the Tabulations worksheet.
2. Once this form is completed (which can be done simply by filling out the Tabulations sheet), print this sheet for the workgroup participants. Print one copy per person.

Click [here](#) to access the WCA Tabulations Workbook in Excel on this CD-ROM.

## **Instructions for Facilitators when Tabulating by Hand and Using Printed Copies of the Tabulations Workbook**

### Tabulations (first worksheet)

1. Record the score for each of the 8 climate items, moving horizontally across the chart for each team member. Calculate the average score for each team member in the far right column, and then calculate the overall climate score by averaging the all of the "individual scores."
2. Do the same for the two items on productivity and quality.
3. DO NOT hand out copies of this sheet for the workgroup members.

### Feedback Chart (for teams)

1. Once all of the necessary data has been input in the tabulations sheet, record the average Individual Climate Scores into the columns provided on the Feedback Chart.
2. Once this form is completed, make copies of this sheet for the workgroup participants. Make one copy per person.

### Feedback Graph (for teams)

1. This graph should also be based on the data you recorded on the Tabulations worksheet. Draw a bar graph of each team member's average score, and one bar for the overall climate score.
2. Once this form is completed, make copies of this sheet for the workgroup participants. Make one copy per person.



### Tabulation Sheet #1: climate items

The facilitator records scores for the 8 climate items in this table. Average scores are then calculated for each person and an overall climate score is calculated for the team.

	Item 1	Item 2	Item 3	Item 4	Item 5	Item 6	Item 7	Item 8	Individual Climate Score (average across all items)
Team member 1									
Team member 2									
Team member 3									
Team member 4									
Team member 5									
Team member 6									
Team member 7									
Team member 8									
Team member 9									
Team member 10									
<b>Overall team climate score (average across all individuals):</b>									

### Tabulation sheet #2: additional items

The facilitator records scores for the quality and productivity items. An overall team score is then calculated for each item.

	Quality (Item 9)		Productivity (Item 10)
Team member 1			
Team member 2			
Team member 3			
Team member 4			
Team member 5			
Team member 6			
Team member 7			
Team member 8			
Team member 9			
Team member 10			
<b>Overall team score:</b>			

### Feedback chart for teams

Baseline (pre intervention) climate scores

<b>Team members</b>	<b>PRE: Individual Climate Scores</b>
Team member 1	
Team member 2	
Team member 3	
Team member 4	
Team member 5	
Team member 6	
Team member 7	
Team member 8	
Team member 9	
Team member 10	
<b>Overall team climate score</b>	
<b>Team score on quality:</b>	
<b>Team score on productivity:</b>	

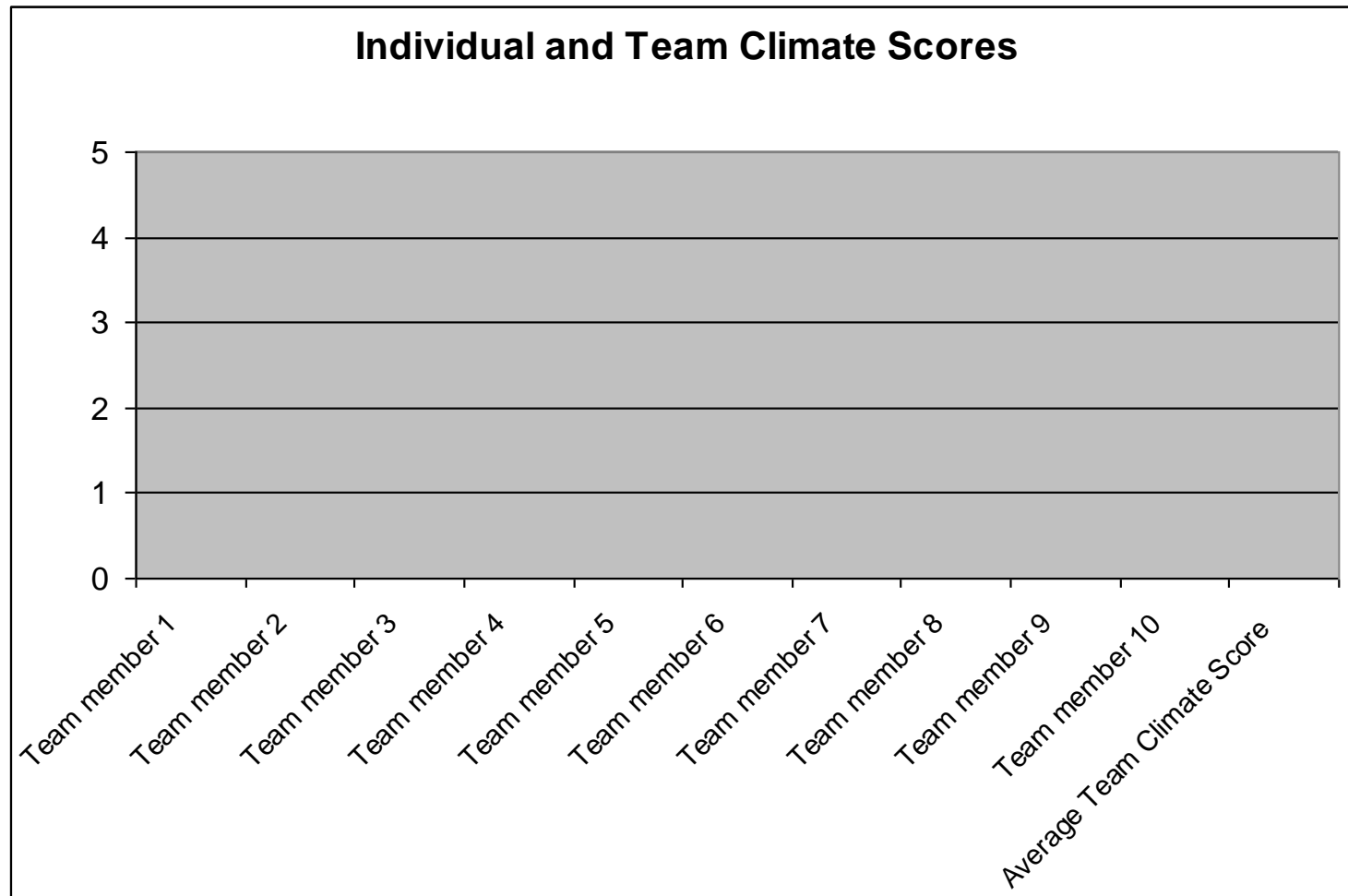
## Feedback chart for teams

Follow-up (post intervention) climate scores

Team members	PRE: Individual Climate Scores		POST: Individual Climate Scores
Team member 1			
Team member 2			
Team member 3			
Team member 4			
Team member 5			
Team member 6			
Team member 7			
Team member 8			
Team member 9			
Team member 10			
<b>Overall team climate score</b>			
<b>Team score on quality:</b>			
<b>Team score on productivity:</b>			

## Feedback graph for teams

The facilitator plots the individual scores and overall team score on this graph.



## **ANNEX 5 – Instructions for Applying the WCA with Other Members of Your Workgroup**

**PURPOSE:** To introduce the concept of workgroup climate to your team and to have the team fill out the Workgroup Climate Assessment

**TIME:** 1 hour

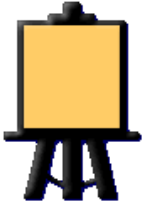
**OBJECTIVES:** By the end of this session, your team members will:

- Recognize the elements that make up a positive workgroup climate
- Understand how workgroup climate impacts performance
- Fill out the Workgroup Climate Assessment

**MATERIALS FOR MEETING:**

- Flip chart and markers
- Copies of the WCA for each member of your team
- Large envelope for completed WCA forms

## DELIVERY



**STEP 1:** Explain that you are going to talk about what you have learned in the workshop about how workgroup climate affects performance and that the team is going to have the chance to fill out a questionnaire that will measure their workgroup climate before and after they participate in the Leadership Development Program.

**STEP 2:** Write the **OBJECTIVES** of the meeting on a flipchart—read through them

**STEP 3:** Ask your team to think of a time when they were a member of a workgroup that they did not like or felt it was a struggle to get anything done as a team.

- What was it like to be a member of that workgroup?
- What were their perceptions and feelings about the environment of that workgroup?
- Why do they think the workgroup was unable to get anything done?
- Record their responses on flipchart

**STEP 4:** Now ask them to think of a time when they were a member of a workgroup that they enjoyed working with and that was successful in achieving results.

- What was it like to be a member of that workgroup?
- What were their perceptions and feelings about the environment of that workgroup?
- Why do they think the workgroup was able to achieve results?
- Record their responses on flipchart

**STEP 5:** Explain that one of the goals of the Leadership Development Program is to help teams to improve their work climate at the same time that they work together on addressing an important challenge. One of the ways to improve climate is for a team to measure it using a short survey called the WCA, to discuss what the survey results show, and to brainstorm ways to improve it.

**STEP 6:** Explain that the survey is completely confidential and that no one's name will appear on it. When the team gets back their results, the feedback chart will only say Team Member #1 and Team Member #2. No names will be used. Also explain that the surveys will go into an envelope which will then be taken to the workshop facilitators. After the second workshop, the facilitators will give participants a chart of their team's results to bring back to the team for discussion.



**STEP 7:** Go over the Instructions on the first page of the WCA for how to fill out the questionnaire. Ask people if there are any questions about how to fill it out. When everyone has filled out the questionnaires, pass around the envelope to put the completed forms inside.

**STEP 8:** Bring the envelope back to the facilitators along with a list of the team members who filled it out. The list will help you remember who filled it out the first time so that when you apply the follow-up WCA after the program is over you will know you have asked everyone to fill it out.

**STEP 9:** If a team member was missing during the presentation but will be participating in selecting a challenge and implementing the action plan, briefly explain the purpose of the WCA and ask them to fill out the questionnaire and put it in the envelope.