

# OEI Feedback Report

**Sample Company**  
**July 2005**



human synergistics/center for applied research, inc.

# Executive Summary

Sample Company administered the Organizational Effectiveness Inventory (OEI) to 1510 of its members in July 2005. The OEI was used to assess Sample Company's performance along certain indicators of effectiveness (e.g., teamwork, motivation, quality of products/services) and the condition of various internal factors that impact effectiveness (e.g., structures, systems, leadership).

This summary provides a synopsis of Sample Company's OEI results and contains a visual recap of the findings (located at the end of the summary). Detailed information regarding the results can be found in the sections of the Feedback Report indicated below.

## ***Causal Factors (Section 2 of Feedback Report)***

Causal factors influence Sample Company's effectiveness both directly and through their impact on the organization's operating culture. The causal factors measured by the OEI include mission and philosophy, as well as structures, systems, technology, and skills/qualities.

Sample Company's results along causal factors are compared to the Historical Averages and Constructive Benchmarks available for these measures. The Historical Averages are based on the OEI results of over 1000 other organizational units. The Constructive Benchmarks are based on the OEI results of 172 organizational units with predominantly Constructive (healthy) cultures. Better than average scores along the causal factor measures are associated with higher levels of performance and long-term effectiveness. Such results are likely to be achieved when causal factors are aligned with and reflect the organization's values.

Mission and philosophy represent the means by which organizations transport their values to their day-to-day structures, systems, technology, and skills/qualities. As measured by the OEI, Sample Company's results are:

- **Better than average** in the area of **Articulation of Mission** (the extent to which the organization's mission is clearly defined,

illustrated by members, communicated by management, and understood by employees).

- **Below average** in the area of **Customer Service Focus** (the extent to which members believe that they are responsible for identifying and satisfying the needs of customers or clients).

In turn, Sample Company's results are equal to or better than the Historical Averages for 13 of the 29 structures, systems, technology, and skills/qualities that were measured. Specifically, Sample Company's most favorable scores are in the areas of:

- **Use of rewards**, in terms of the likelihood that good performance will be noticed and reinforced in positive ways (i.e., "positive reinforcement").
- **Personal bases of power** (sources of power that generally have positive effects), in terms of the extent to which members are influenced due to their supervisors'/managers' technical expertise or competence (i.e., expert power); the respect that they have for their supervisors/managers (i.e., referent power); and their supervisors'/managers' willingness to be influenced by them (i.e., exchange power).

Sample Company's *least* favorable scores are in the areas of:

- **Significance**, in terms of the degree to which jobs are viewed by members as having an important impact on other people (either inside or outside of the organization).
- **Feedback** (from the job), in terms of the degree to which carrying out their jobs directly provides members with information about their performance.

If Sample Company decides that organizational development and changes are warranted, the causal factors along which it scored unfavorably (and particularly those with the least favorable scores) should be considered as potential levers for change.

### ***Outcomes (Section 3 of Feedback Report)***

The OEI assessed Sample Company's performance in terms of various outcomes at the individual, group, and organizational levels. Results along these measures provide insights into Sample Company's long-term effectiveness and indicate the necessity and urgency for changes and improvements along causal factors.

Sample Company's outcome results are compared to the Historical Averages and Constructive Benchmarks for these measures. Better than average performance along outcomes are desirable and contribute to the organization's long-term effectiveness.

Sample Company's scores are equal to or better than the Historical Averages for two of the 12 outcomes that were measured. Specifically, Sample Company's most favorable scores are in the areas of:

- **Role conflict**, in terms of the extent to which members receive inconsistent expectations from the organization and are expected to do things that conflict with their own preferences.
- **Intra-unit teamwork and cooperation**, in terms of the extent to which people within sub-units work in a collaborative, supportive manner and adjust their activities, as needed, to facilitate task accomplishment at the group level.

Sample Company's *least* favorable scores are in the areas of:

- **Departmental-level quality**, in terms of the extent to which members believe that services provided *by* their own sub-unit (either to internal or external clients) are of the highest quality possible.
- **Role clarity**, in terms of the extent to which member receive clear messages regarding what is expected of them.

### ***Planning for Change (Section 4 of Feedback Report)***

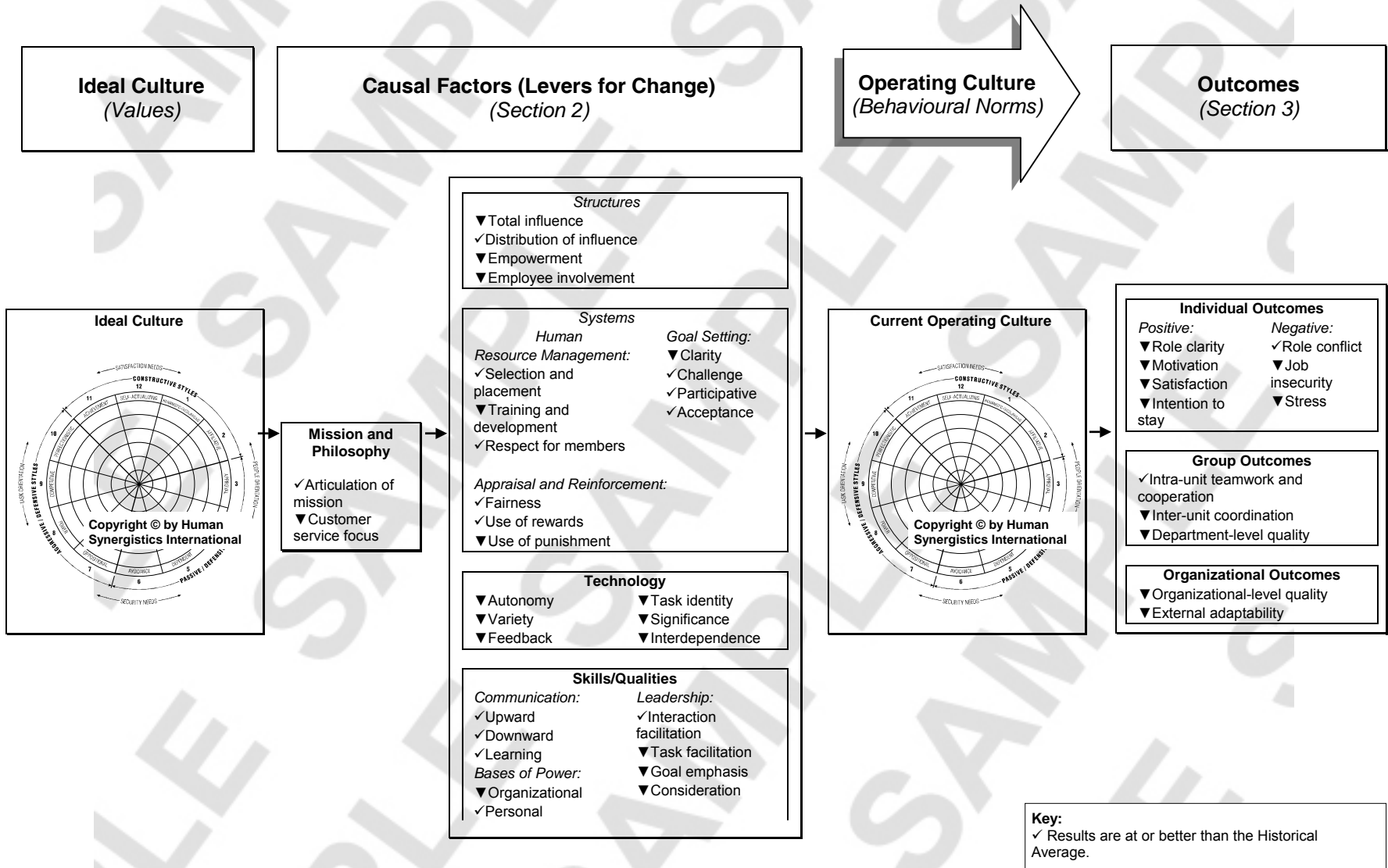
In most cases, the impact of causal factors on outcomes is readily apparent from examining the OEI results. When causal factors are better than the Historical Averages and Constructive Benchmarks, it is usually because they are well-aligned with the organization's values and, subsequently, the outcomes achieved tend to be favorable. When

causal factors are worse than the Historical Averages, it is typically because they are inconsistent with the organization's values and, as a result, the outcomes realized tend to be unfavorable. In these cases, the identification of areas for improvement and levers for change are relatively straightforward.

However, in a minority of cases, the impact of causal factors may not yet be obvious and the need for change may be unclear. For instance, when organizations that score below average on most of the causal factors also perform well along certain outcomes, the tendency is to attribute their success to the internal factors and conditions that managers have created and reinforced. Yet, in most of these cases, performance is due to extraneous factors or advantages (e.g., excessive resources, patents, copyrights, limits on competition, monopoly status, regulation, etc.) that allow such organizations to appear successful *despite* the ineffectual nature of their structures, systems, technologies, and skills/qualities. The impact of causal factors eventually catches up with these organizations—usually when resources become depleted and unwanted attention is drawn to poor management and inefficiencies that were previously masked by the effects of extraneous factors.

If Sample Company's results along outcomes (or other effectiveness criteria) do not seem to follow its causal factor results, the potential impact of extraneous factors and advantages on outcomes should be considered. Unless these extraneous factors and conditions are likely to be favorable indefinitely, Sample Company needs to determine the kinds of changes necessary for maximizing its performance and long-term effectiveness both in the presence and in the absence of such factors and conditions.

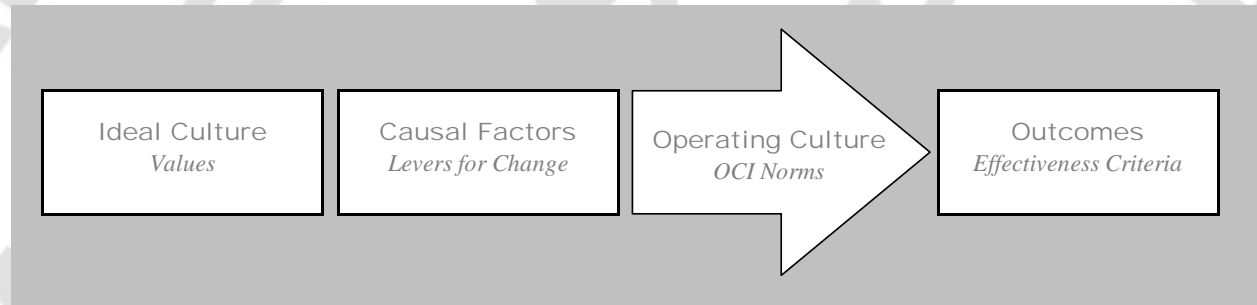
# Summary of Sample Company's OEI Results (July 2005)



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# Introduction 1

**W**ith ever-growing competition and shorter product and service life cycles, most organizations have found that standardized methods and strict controls are no longer a viable way to run a business. Now, more than ever, organizational success is dependent upon management's ability to empower members to think and behave like owners. That's why, in addition to monitoring traditional financial and production performance indicators, many organizations are directing greater attention to the internal factors and conditions that have an impact on their performance.

The Organizational Effectiveness Inventory (OEI) was developed in response to demands for reliable and valid measures of attitudinal and behavioral indicators of effectiveness, as well as measures of the internal factors and conditions that directly and indirectly (through an organization's culture) impact effectiveness. In turn, the OEI Feedback Report is designed to help change agents, managers, and organizational members understand and use the results to evaluate Sample Company's effectiveness and identify areas for improvement.

This Feedback Report summarizes the responses of 1510 members within Sample Company who completed the OEI. The information they provided will enable you to:

- identify the *internal causal factors* that shape and reinforce Sample Company's operating culture and impact its performance,
- evaluate Sample Company's performance along *key outcomes* at the individual, group, and organizational levels,
- outline a plan for change and improvement, and
- uncover the *differences between subgroups* that lead some units to be more effective than others within Sample Company.

## ***The Organizational Effectiveness Inventory***

The OEI provides organizations with the means for evaluating both the *causal factors* that influence their long-term effectiveness and the *impact* of those factors on their members, groups/teams, and organizations as a whole. The questions included in the survey are based on contemporary articles and books, established theories, and classical writings in the areas of human resource management and organizational behavior. Some of the questions focus on the entire organization; other questions are specific to the respondent's department, supervisor/manager, or job.

The causal factors measured by the OEI can be instrumental in understanding—as well as improving—an organization's performance and long-term effectiveness. These factors are organized into five general categories:

- **mission and philosophy**, which includes measures of articulation of mission and customer service focus;
- **structures**, which includes measures of influence, empowerment, and employee involvement;
- **systems**, which includes measures of human resource management, appraisal and reinforcement, and goal setting;
- **technology**, which includes measures of job design and interdependence; and
- **skills/qualities**, which includes measures of the skills and qualities exhibited by members, including those in leadership positions.

The OEI also assesses the organization's performance along various indicators of long-term effectiveness, including:

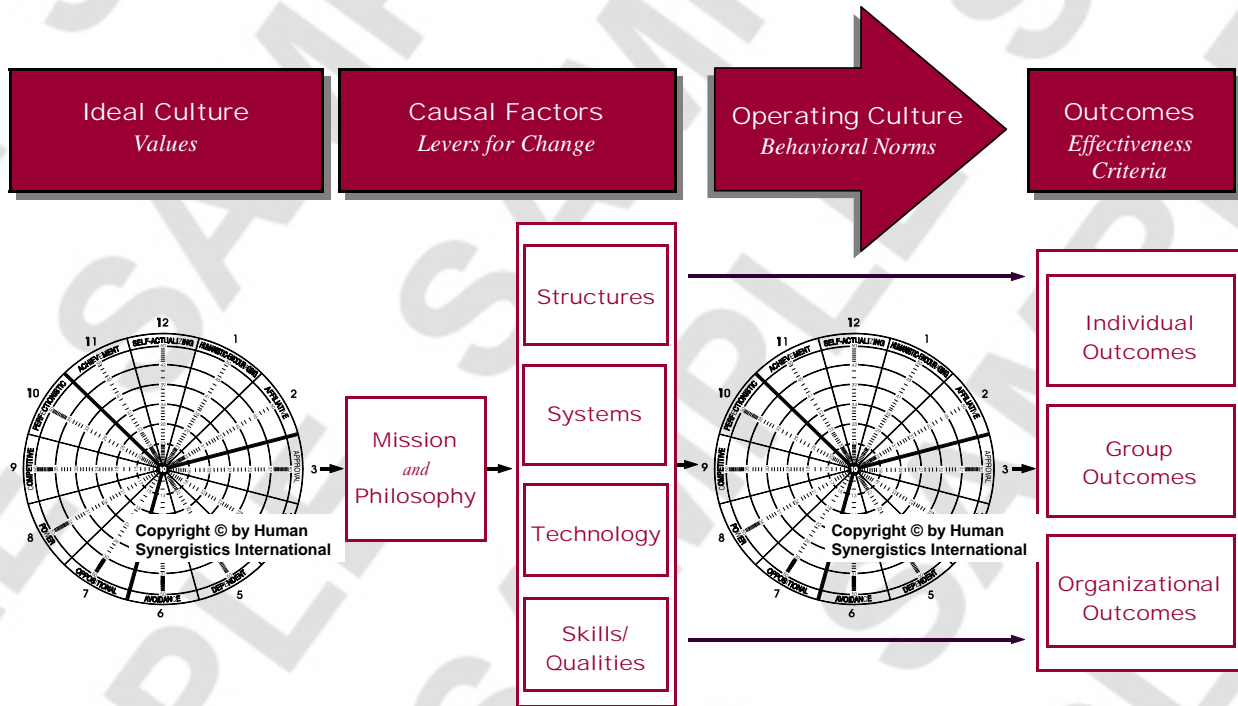
- **individual outcomes**, such as motivation, satisfaction, and intention to stay;
- **group outcomes**, such as intra-unit teamwork and inter-unit coordination; and
- **organizational outcomes**, such as quality of customer service and external adaptability.

The information provided by the OEI has enabled organizations to identify levers for change and improvement, as well as uncover those factors interfering with other change efforts. It also has been used to plan for organizational development and to educate managers in the importance of structures, systems, technology, and skills/qualities to outcomes of concern.

### The Theoretical Model

The theoretical model shown below presents the major internal causal factors that impact an organization’s performance and long-term effectiveness. As depicted by the model, causal factors can affect outcomes both directly and through their impact on the organization’s operating culture. The causal factors that most directly influence culture and outcomes are structures, systems, technology, and skills/qualities.

The Theoretical Model



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**Structures** refer to the ways in which components (such as people, tasks, and roles) are ordered and coupled to create organization. Aspects of structure that can influence an organization's operating culture and performance include its design (such as degree of centralization, formalization, and specialization) and the extent to which it promotes or restricts members' involvement and empowerment.

**Systems** refer to the interrelated sets of procedures—such as human resource, information, accounting, and quality control systems—an organization uses to support its core activities and solve problems. Human resource management, appraisal and reinforcement, and goal-setting systems are among the most powerful factors for shaping—as well as redirecting—the operating culture of an organization and for influencing its performance and long-term effectiveness.

**Technology** refers to the methods by which an organization transforms inputs into outputs. Aspects of technology that have been found to have an impact on the operating culture and outcomes include job design, job complexity, and degree of interdependence among members.

**Skills/qualities** of organizational members—particularly those who hold leadership roles—have an impact on the operating culture of an organization, its performance, and its long-term effectiveness. Examples of relevant skills and qualities revolve around communication, leadership, sources of power and influence, and methods for conflict resolution.

Mission and philosophy are also important causal factors, though their impact on culture and outcomes is more indirect than that of structures, systems, technology, and skills/qualities. Mission and philosophy are the mechanisms by which organizations explicitly communicate their values to members. When the mission and philosophy are clear, well-understood, and used (for example, in making decisions about structures, systems, technology, and skills/qualities), causal factors are likely aligned with the organization's values, the operating culture reflects the ideal culture, and the organization generally performs favorably along outcomes. In contrast, when the organization's mission and philosophy do not clearly communicate its values or are not used, causal factors tend to be inconsistent with values, the operating culture is considerably different from the ideal, and the outcomes realized tend to be less favorable.



# Causal Factors 2

The OEI assesses causal factors at the member/job, manager/unit, and organizational levels. These factors include the mission and philosophies, structures, systems, technologies, and skills/qualities that shape the operating cultures of organizations and influence their effectiveness. Results along these factors can be used to identify what is contributing to versus detracting from Sample Company's current performance and can help to pinpoint where changes can be made to improve its long-term effectiveness.

### ***Causal Factors Assessed by the OEI***

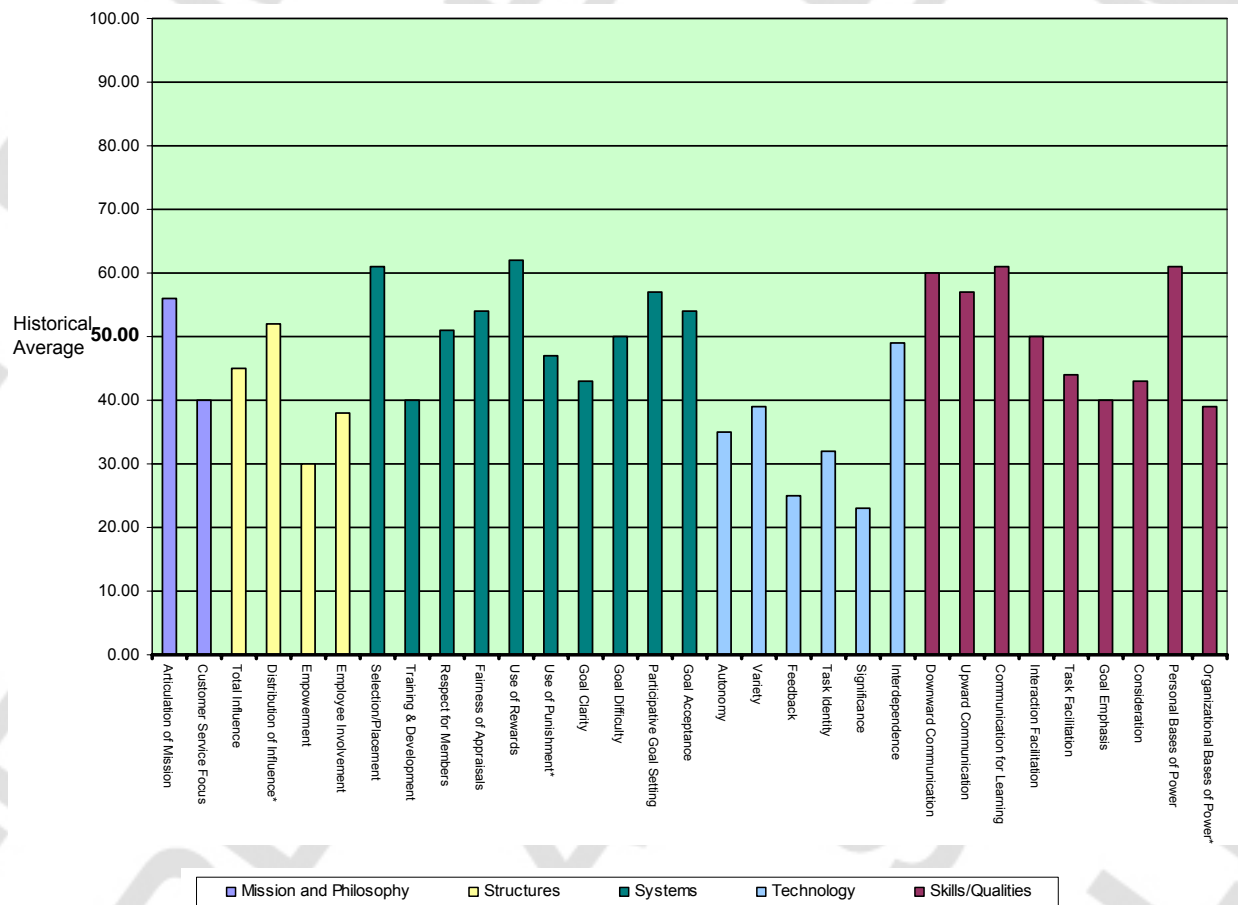
The OEI assesses 31 specific factors and conditions that are causally related to outcomes indicative of an organization's long-term effectiveness. These causal factors are organized into the following categories:

- **Mission and Philosophy**, including how clearly the organization articulates its identity and values to members and its focus with respect to customers.
- **Structures**, including the extent to which people, roles, and activities are organized to maximize (versus limit) influence, empowerment, and employee involvement.
- **Systems**, including the extent to which human resource management, appraisal and reinforcement, and goal-setting systems are designed to promote employee motivation, participation, and development.
- **Technology**, including various job design characteristics and the degree of interdependence among members.
- **Skills/Qualities**, including those related to communication, leadership styles, and the sources of power used by supervisors and managers.

## Summary of Results

The barchart below shows Sample Company's percentile scores for each of the causal factors (and therefore permits comparisons between the results for different causal factors). The percentile scores are based on the distribution of raw scores from a sample of 1084 organizational units. The 50<sup>th</sup> percentile (center bold line) is the median or Historical Average. Bars extending above the 50<sup>th</sup> percentile are desirable; bars extending below the 50<sup>th</sup> percentile are undesirable.

Summary Barchart of Causal Factors (Percentile Scores)



Note. In the barchart shown above, the scores for distribution of influence, use of punishment, and organizational bases of power were reversed so that higher percentile scores signify more desirable results.

## ***Interpreting the Detailed Results***

The remainder of this section focuses on Sample Company's detailed results for each of the causal factors. These results are based on the average (mean) responses of all members who completed the OEI ("all respondents") and are compared to our Historical Averages and Constructive Benchmarks:

**The Historical Averages** reflect the median of the responses of members from 1084 organizational units. In general, you'll want Sample Company to score better than average (where the direction of "better" is defined by the Constructive Benchmarks).

**The Constructive Benchmarks** are based on the median OEI results of 172 organizational units with predominantly Constructive (healthy) operating cultures as indicated by the Organizational Culture Inventory. Specifically, the operating cultures of these units were relatively strong in terms of Constructive norms and expectations (at or above the 60<sup>th</sup> percentile) and relatively weak in terms of Passive/Defensive and Aggressive/Defensive norms and expectations (below the 50<sup>th</sup> percentile).

As you review the results, consider the extent to which Sample Company's mission and philosophy, structures, systems, technology, and skills/qualities reflect its values. Organizations that create and reinforce internal factors and conditions that are consistent with their values are generally more effective than organizations that do not follow through on their values.

## ***Mission and Philosophy***

Mission and philosophy are the mechanisms by which organizations explicitly communicate their values to members. The OEI assessed Sample Company's mission and philosophy in terms of:

*Articulation of mission:* The extent to which its mission and philosophy are clearly defined, illustrated by members, communicated by management, and understood by employees.

*Customer service focus:* The extent to which its members understand they are responsible for identifying and satisfying the needs of customers/clients.

Overall, Sample Company's mission and philosophy results are about the same as the Historical Averages and are not as positive as the Constructive Benchmarks for these measures. Detailed results are shown on the next page.

#### Implications for Effectiveness

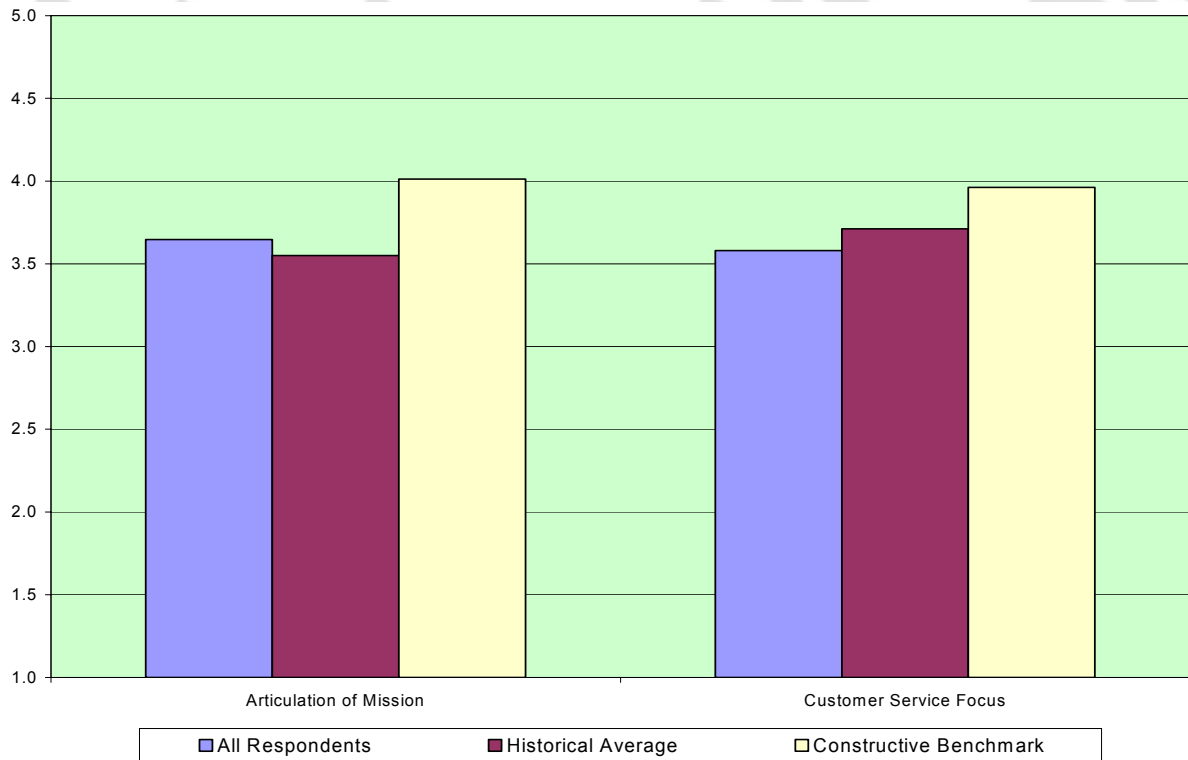
A clear and well-understood mission and philosophy is a prerequisite to achieving alignment between organizational values, causal factors, and the operating culture. When the mission and philosophy are clearly articulated and understood, a consistent set of values is more likely to be acted upon and reflected in the behaviors and decisions of each and every organizational member—including those in leadership positions. In general, *high scores* along the mission and philosophy measures are associated with:

- high intensity cultures (i.e., high agreement among members regarding what is valued and expected),
- collaborative efforts to reach organizational goals, and
- long-term organizational effectiveness.

In contrast, *low scores* along the mission and philosophy measures indicate that the organization and its leaders need to:

- more clearly define and articulate the vision, mission, and values of the organization;
- expend greater effort to reward and reinforce behaviors that are consistent with those values; and
- establish mechanisms that enable people throughout the organization to constructively change and improve the system.

Mission and Philosophy



Data Removed From Sample Report

	All Respondents	Historical Average	Constructive Benchmark
<b>Articulation of Mission</b>	<b>###</b>	<b>###</b>	<b>###</b>
Objects/priorities are clear and understood by members	<b>###</b>	<b>###</b>	<b>###</b>
People have a clear understanding of mission and role	<b>###</b>	<b>###</b>	<b>###</b>
Widely-shared philosophy provides employees an understanding	<b>###</b>	<b>###</b>	<b>###</b>
Ceremonies are held to celebrate outstanding work	<b>###</b>	<b>###</b>	<b>###</b>
Member's actions illustrate philosophy and priorities	<b>###</b>	<b>###</b>	<b>###</b>
<b>Customer Service Focus</b>	<b>###</b>	<b>###</b>	<b>###</b>
Your department is responsible for client satisfaction	<b>###</b>	<b>###</b>	<b>###</b>
You are encouraged to emphasize the perspective and needs of customers	<b>###</b>	<b>###</b>	<b>###</b>
You are relied on to provide information about customers	<b>###</b>	<b>###</b>	<b>###</b>
Your organization relies on you to help with customers and generate sales	<b>###</b>	<b>###</b>	<b>###</b>

Scale scores are in boldface and are shaded.

Item scores are listed below scale scores.

For Articulation of Mission, item and scale scores can range from 1 ("disagree") to 5 ("agree"). For Customer Service Focus, item and scale scores can range from 1 ("not at all") to 5 ("to a very great extent").

## Structures

The OEI assessed Sample Company's structures in terms of:

- *Total influence*: The average amount of influence exercised by members across all organizational levels.
- *Distribution of influence*: The extent to which influence is hierarchical and concentrated at the top as opposed to decentralized across organizational levels.
- *Empowerment*: The extent to which people are given the authority, resources, experience, and opportunity to work autonomously.
- *Employee involvement*: The extent to which people at all levels actively participate in shaping the organization and in helping to achieve its mission.

Overall, Sample Company's results along the structure measures are not as positive as the Historical Averages and are not as positive as the Constructive Benchmarks. Detailed results for the structure measures are provided on the following pages.

### Implications for Effectiveness

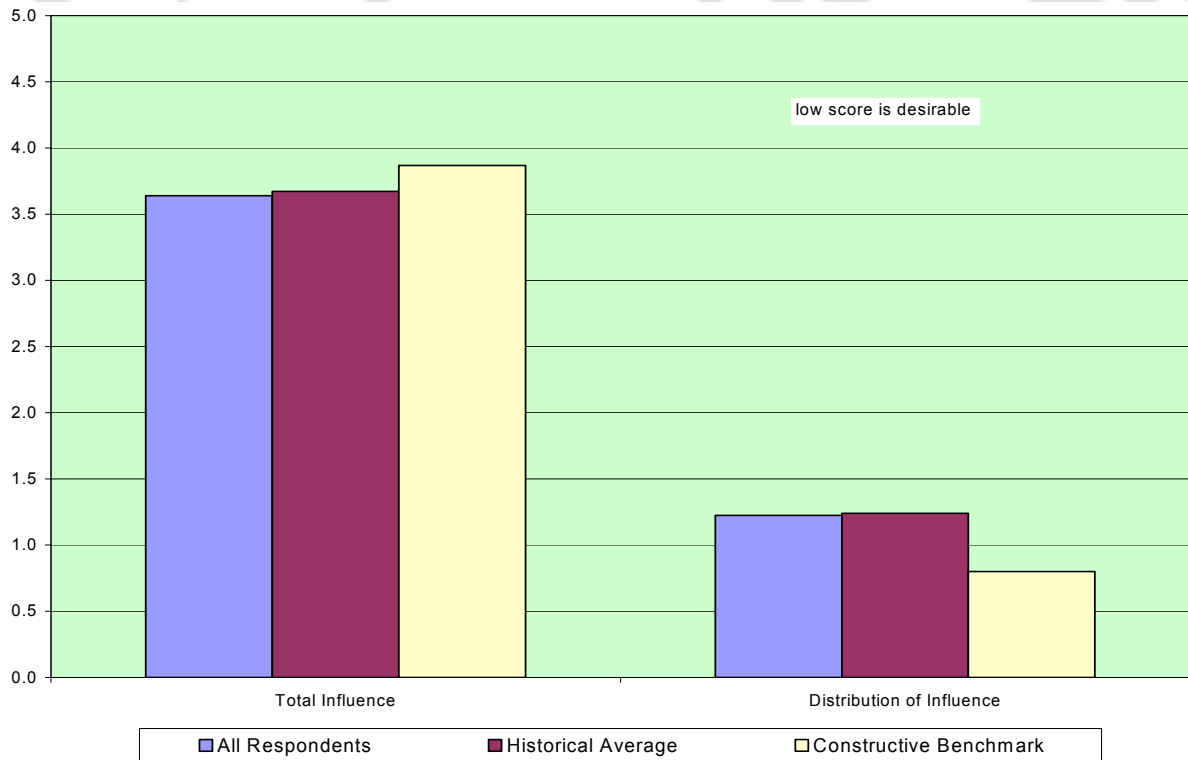
Structures that enhance the influence, empowerment, and involvement of members at all levels contribute to long-term effectiveness. *High scores* for total influence, empowerment, and employee involvement (and *low scores* for distribution of influence) are associated with:

- a Constructive operating culture,
- the ability of all members to make changes and improvements, and
- high levels of profitability, quality, and innovativeness.

*Low scores* for total influence, empowerment, and employee involvement (and *high scores* for distribution of influence) indicate the need for:

- organizational re-design (to modify a hierarchical and possibly bureaucratic structure),
- managerial training in empowerment and the use of power, and
- the sharing of relevant information throughout the organization.

Influence



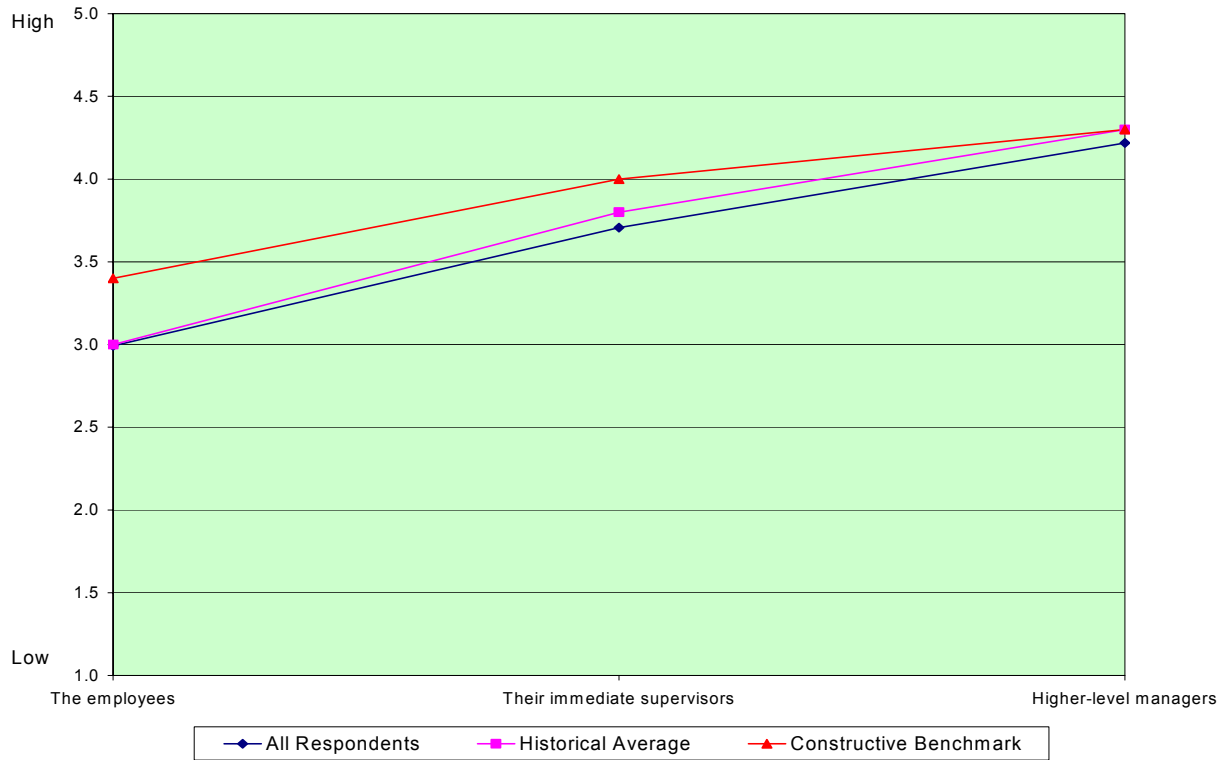
Data Removed From Sample Report

	All Respondents	Historical Average	Constructive Benchmark
<b>Total Influence</b>	<b>###</b>	<b>###</b>	<b>###</b>
<b>Distribution of Influence</b>	<b>###</b>	<b>###</b>	<b>###</b>
The employees	###	###	###
Their immediate supervisors/managers	###	###	###
Higher-level managers	###	###	###

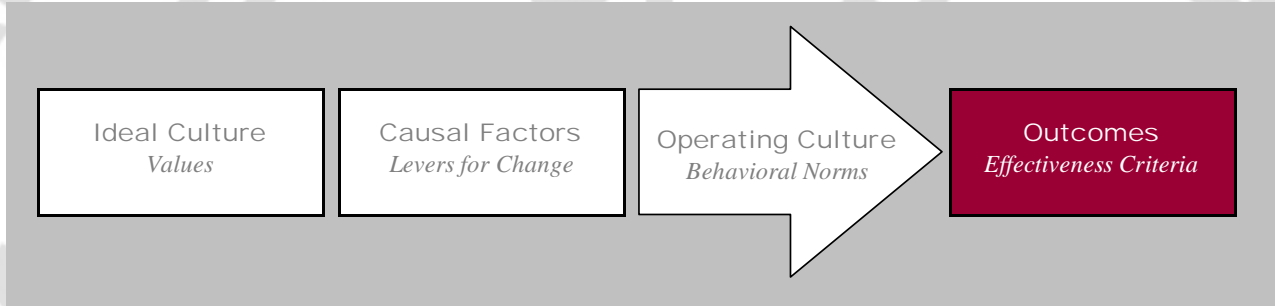
**Scale scores are in boldface and are shaded.**

Scores reflecting the influence of members at different organizational levels are listed below the scale scores. For the Total Influence scale and the items, scores can range from 1 ("no influence at all") to 5 ("very great influence"). For the Distribution of Influence scale, scores are based on the difference between the influence of *higher-level managers* versus *the employees* (i.e., the influence of higher-level managers minus the influence of employees).

Control Graph (Distribution of Influence)



*Note.* The control graph shows the mean influence scores for “employees” (non-managers), “their immediate supervisors/managers” (first-line managers), and “higher-level managers” (people at the top) within Sample Company as compared to our Historical Averages and Constructive benchmarks. The steeper the slope of the line between employees and higher-level managers, the more hierarchical and centralized the distribution of influence. Conversely, the flatter the slope of the line between employees and higher-level managers, the less hierarchical and more decentralized the organization in terms of influence.



# Outcomes 3

**T**he OEI measures various intermediate outcomes associated with long-term effectiveness. These measures provide a good indication of Sample Company's ability to successfully adapt to changes and prosper in the future.

In most cases, the correspondence between an organization's causal factors and its effectiveness is apparent. Thus, organizations that score well along most of the causal factors will generally score well along most, if not all, of the OEI outcome measures. In contrast, organizations that score below average along several of the causal factors usually score relatively poorly along a number of the outcomes measured by the OEI. However, the correspondence between causal factors and performance along certain short-term criteria is not always as clear. For instance, when organizations that score poorly along several causal factors also perform well along particular financial indicators of performance, the tendency is to assume that such organizations are effective *because* of their structures, systems, and management practices. Upon closer examination, however, it is evident that such organizations achieve certain types of successes *despite* the ineffective nature of their structures, systems, or practices.

**The defensive misattribution of success** occurs when favorable performance is attributed to sub optimal structures, systems, or practices when instead it is substantial resources and/or minimal demands that account for the successes currently enjoyed by the organization. For example, organizations with strong franchises, munificent environments, extensive patents and copyrights, or massive financial resources are likely to perform adequately—at least in the short term and possibly even over the long term—if financial pressures for innovation, adaptation, or flexibility remain minimal. In such cases, managers can “get away with” using structures, systems, technology, and leadership styles that restrict participation, destroy motivation, and, in the process, create a dysfunctional operating culture. Since most people attribute successes to themselves and failures to external factors, it is almost guaranteed that these managers will credit the structures, systems, or defensive cultures that they created (or inadvertently allowed to emerge) as being the sources of their organizations' effectiveness. Although the negative impact of these causal factors may be overshadowed by that of resources and demands, these organizations could nevertheless enhance their performance, increase their adaptability, and protect

themselves from being blind-sided by environmental changes by altering their structures, systems, technologies, and skills/qualities so that they promote (rather than inhibit) long-term effectiveness.

This section describes Sample Company's results along outcomes at the individual, group, and organizational levels. As you review the results, consider how they might be explained by the causal factors described in Section 2.

### ***Outcomes Assessed by the OEI***

The OEI measures 12 specific outcomes indicative of an organization's vitality and long-term effectiveness. These outcomes are organized into three general categories:

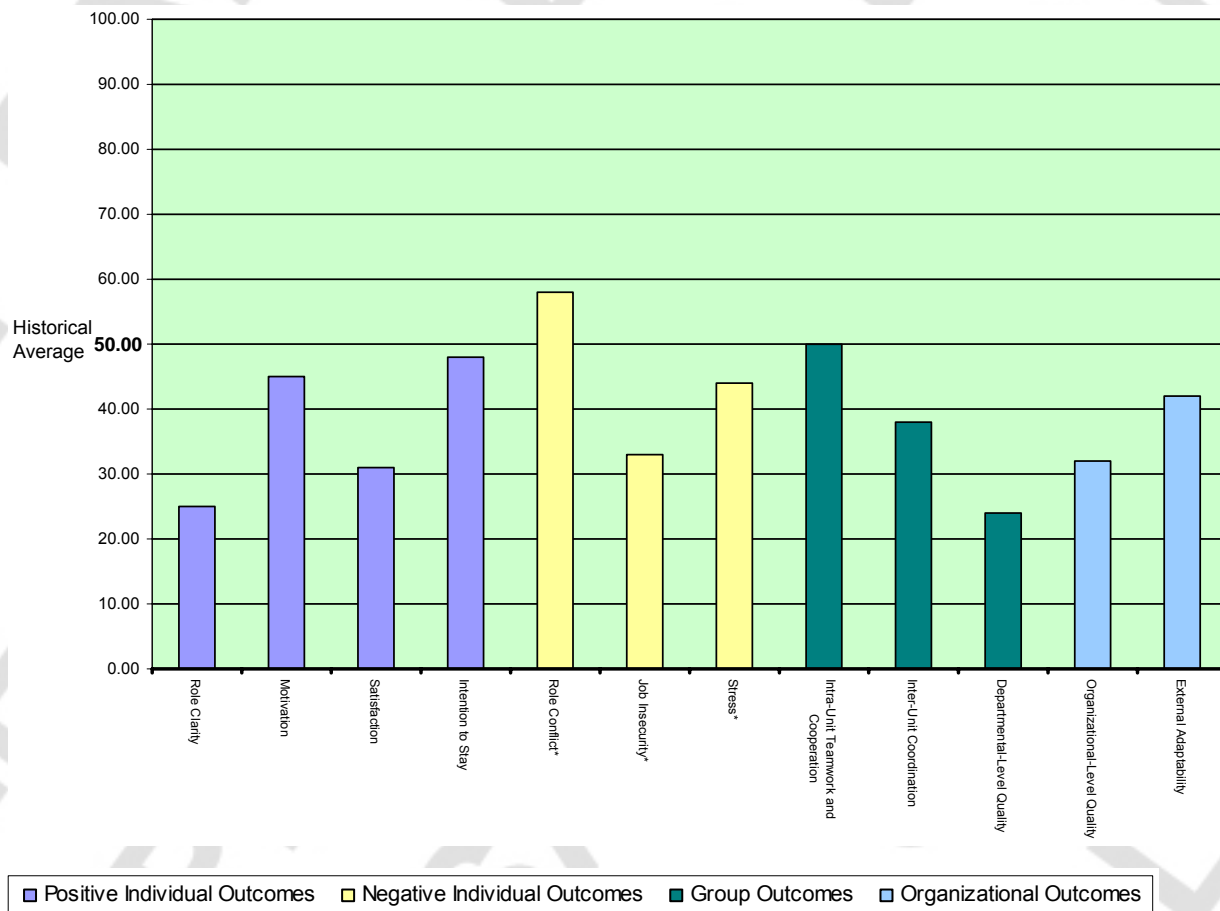
- **Individual outcomes**, which focus on the extent to which the organization has a positive, rather than negative, impact on the personal states and attitudes of its members. Positive measures include role clarity, motivation, satisfaction, and intention to stay; negative measures include role conflict, stress, and job insecurity.
- **Group outcomes**, which focus on the extent to which the organization effectively integrates and coordinates the efforts of its members and units. Specific measures include intra-unit teamwork and cooperation, inter-unit coordination, and department-level quality.
- **Organizational outcomes**, which focus on the organization's effectiveness with respect to its external environment. Specific measures include organizational-level quality and external adaptability.

## Summary of Results

A barchart summarizing Sample Company's outcome results is presented below. The chart shows the percentile scores for each of the outcomes (and therefore permits the results for different outcomes to be compared).

The percentile scores are based on the distribution of raw scores from a sample of 1084 organizational units. The 50<sup>th</sup> percentile (center bold line) is the median. Bars extending above the 50<sup>th</sup> percentile are desirable; bars extending below the 50<sup>th</sup> percentile are undesirable.

Summary Barchart of Outcomes (Percentile Scores)



*Note.* In the Summary Barchart shown above, the scores for negative individual outcomes were reversed so that higher percentile scores signify more desirable results.

## ***Interpreting the Detailed Results***

The remainder of this section focuses on Sample Company's detailed results for each of the outcomes. The results are based on the mean responses of all members who completed the OEI ("**all respondents**") and are compared to our Historical Averages and Constructive Benchmarks:

- **The Historical Averages** reflect the median of the responses of members from 1084 organizational units. In general, you'll want Sample Company to score better than average (where the direction of "better" is defined by the Constructive Benchmarks).
- **The Constructive Benchmarks** are based on the median results of 172 organizational units identified by the OCI as having predominantly Constructive (healthy) operating cultures. Specifically, the operating cultures of these units were relatively strong in terms of Constructive norms and expectations (at or above the 60<sup>th</sup> percentile) and relatively weak in terms of Passive/Defensive and Aggressive/Defensive norms and expectations (below the 50<sup>th</sup> percentile).

## ***Individual Outcomes***

The OEI assessed the extent to which Sample Company's members experience positive and negative outcomes.

### Positive Indices

On the positive side, the OEI measured the extent to which members report pleasurable and productive personal states and attitudes. Specifically, the OEI examined:

- *Role clarity*: The extent to which members receive clear messages regarding what is expected of them.
- *Motivation*: The extent to which forces on and within members lead them to behave in ways consistent with the attainment of organizational goals.
- *Satisfaction*: The extent to which members report positive appraisals of their work situations.

- *Intention to stay:* The extent to which members plan to remain with the organization.

Overall, Sample Company's results along the positive individual outcomes are not as positive as the Historical Averages and are not as positive as the Constructive Benchmarks. Details regarding these results are shown on page 3-8.

#### Negative Indices

On the negative side, the OEI examined the extent to which Sample Company's members report excessive organizational demands, pressures, and negative conditions (stressors), as well as psychological responses to those conditions (stress or strain).

Negative outcomes at the individual level include:

- *Role conflict:* The extent to which members receive inconsistent messages from the organization and are expected to do things that conflict with their own preferences.
- *Job insecurity:* The extent to which members are apprehensive regarding their continued employment with the organization.
- *Stress:* The extent to which members feel they are being pushed beyond their normal range of comfort by organizational demands, pressures, or conflicts.

Overall, Sample Company's results along the negative individual outcomes are not as positive as the Historical Averages and are not as positive as the Constructive Benchmarks. Details regarding these results are reported on page 3-9.

#### Implications for Change and Development

The higher Sample Company scores along the positive indices (and the lower its scores along the negative indices), the greater its effectiveness at the individual level. *High* scores along the positive indices are associated with:

- significant effort by members to attain both personal and organizational goals,
- high member commitment and loyalty to their organization, and
- a propensity for members to do what is needed to correct problems facing the organization.

*Low* scores with respect to the negative indices are also desirable and are associated with:

- Achievement-oriented (as opposed to Avoidance-oriented) behaviors,
- individual health and well-being, and
- fewer accidents and mistakes.

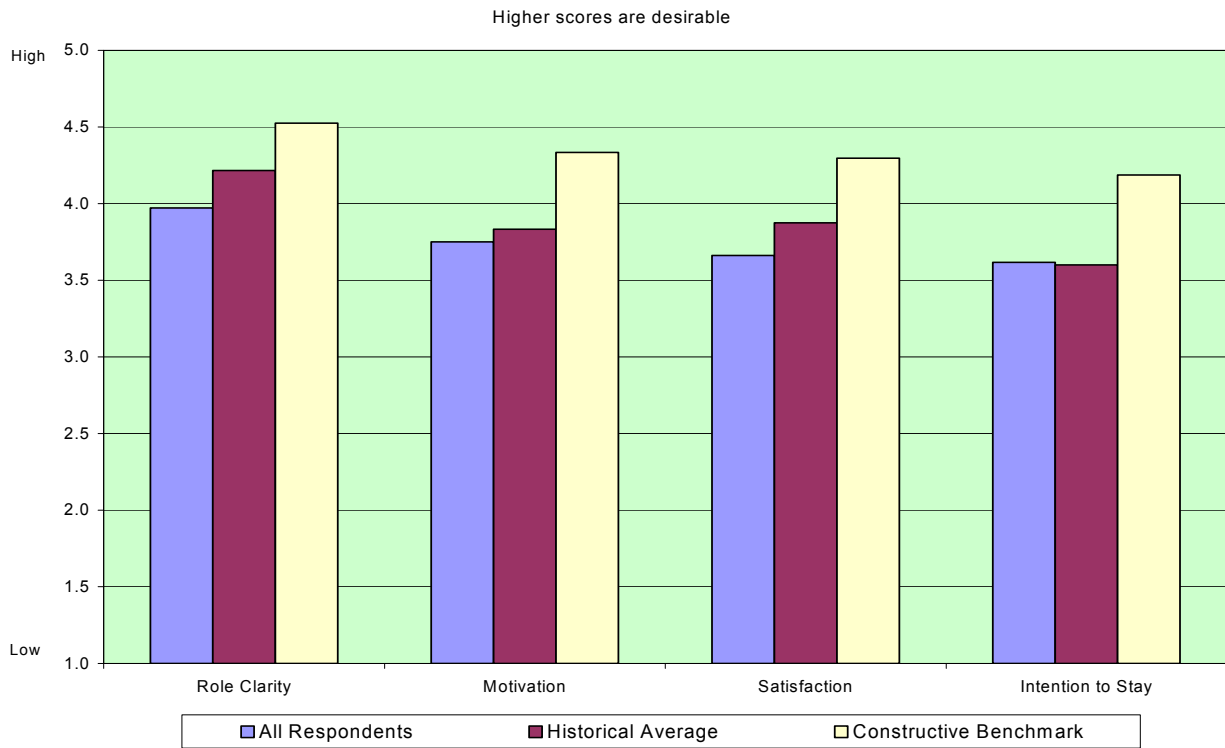
In contrast, *low* scores along the positive indices are undesirable and can indicate the need for:

- changes to create a more Constructive and people-oriented culture,
- clearer goals and better recognition for goal attainment,
- programs that promote more effective interpersonal relations,
- task and job analyses to identify required competencies and resources, and
- job redesign interventions.

*High* scores along the negative indices are undesirable and are associated with inefficient personal efforts, mistakes, and psychological symptoms of strain. Potential remedies include:

- cultural change programs,
- conflict resolution interventions, and
- individual stress-management programs.

Positive Individual Outcomes



Data Removed From Sample Report

	All Respondents	Historical Average	Constructive Benchmark
<b>Role Clarity</b>	###	###	###
You clearly know what's required of you to "fit in"	###	###	###
You know exactly what is expected of you	###	###	###
*You are uncertain about how you're supposed to "act"	###	###	###
<b>Motivation</b>	###	###	###
Your department motivates you to do the highest quality work possible	###	###	###
*It seems pointless to work hard given the way your department is run	###	###	###
Your department inspires the very best in you	###	###	###
<b>Satisfaction</b>	###	###	###
You are satisfied with your present situation in your department	###	###	###
In general, you like working here	###	###	###
<b>Intention to Stay</b>	###	###	###
*You will probably look for a new job in the next year	###	###	###

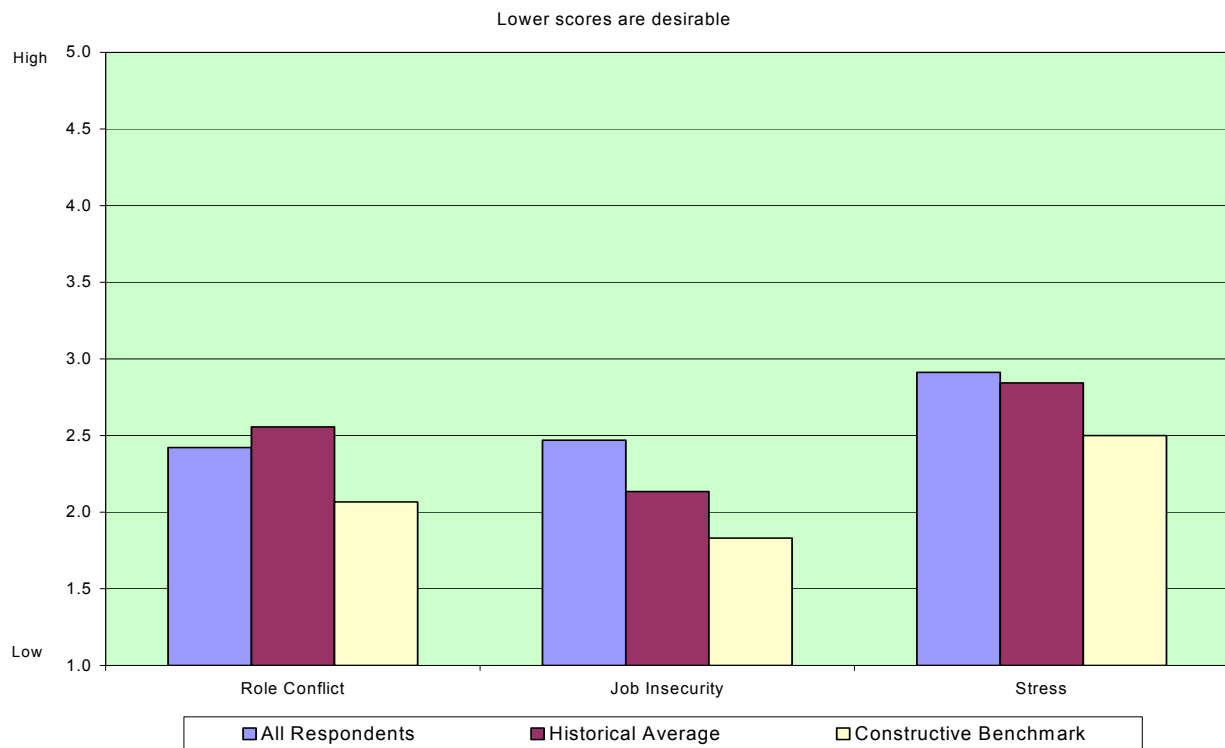
**Scale scores are in boldface and are shaded.**

Item scores are listed below scale scores.

Item and scale scores can range from 1 ("disagree/not at all") to 5 ("agree/to a very great extent").

\*Scores for these items are presented in raw form (but were reversed when calculating the scale scores).

## Negative Individual Outcomes



### Data Removed From Sample Report

	All Respondents	Historical Average	Constructive Benchmark
<b>Role Conflict</b>	<b>###</b>	<b>###</b>	<b>###</b>
You have to change the way you think and behave when you arrive at work	###	###	###
You receive incompatible requests from two or more people	###	###	###
Different people send you "different messages"	###	###	###
<b>Job Insecurity</b>	<b>###</b>	<b>###</b>	<b>###</b>
You worry about being laid off and having to find a new job	###	###	###
*Your job is secure	###	###	###
<b>Stress</b>	<b>###</b>	<b>###</b>	<b>###</b>
*You feel relaxed (not tense and under pressure) at work	###	###	###
Your job situation tends to be frustrating	###	###	###
*You feel good when you're on the job	###	###	###
You find your job stressful	###	###	###

**Scale scores are in boldface and are shaded.**

Item scores are listed below scale scores.

Item and scale scores can range from 1 ("disagree/not at all") to 5 ("agree/to a very great extent").

\*Scores for these items are presented in raw form (but were reversed when calculating the scale scores).



# Planning for Change 4

**P**lanning for change is a crucial part of an organization's development. At a minimum, it requires specifying both the results to be attained and the steps that need to be taken to achieve those results.

This section will help you to outline a plan for change based on the information contained in this report, as well as your own observations. Specifically, this section will guide you in:

- assessing the need for change (Step 1),
- specifying targets and goals for improvement (Step 2),
- identifying levers for change (Step 3), and
- increasing readiness for change (Step 4).

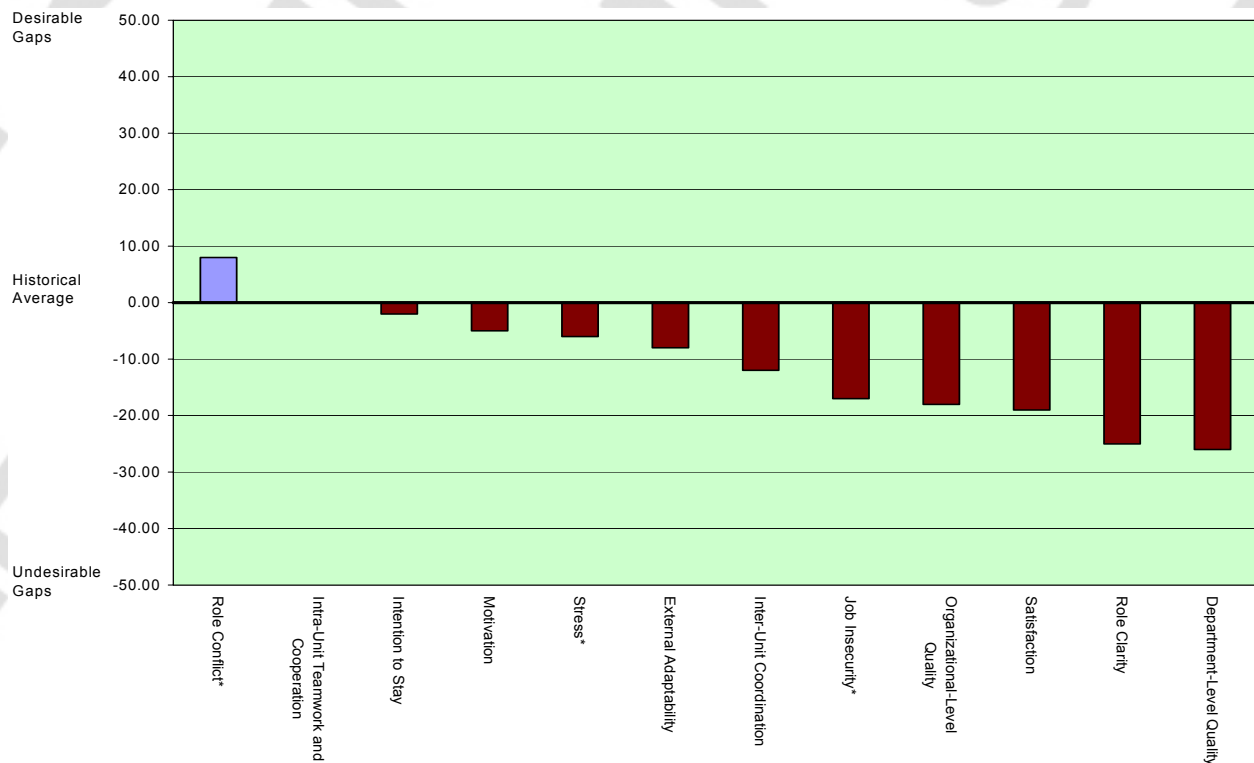
Initially, you may want to work through the planning for change section on your own to generate some preliminary thoughts regarding the OEI results and their implications for change and improvement. Ultimately, however, the planning process should involve Sample Company's leaders, other key change agents, and, possibly, representatives of various groups within the organization who will most likely be affected by (or can influence the success of) the types of changes that are being considered.

## Assessing the Need for Change

The barchart shown below summarizes Sample Company’s outcome results. Similar to the summary barchart presented in Section 3, the chart below shows Sample Company’s percentile scores for each of the outcomes based on a comparison to the OEI results of 1084 other organizational units. The barchart below highlights the “gaps” or differences between Sample Company’s outcome results and the results of the average organization in the following ways:

- Bars extending upward above the Historical Average (0.00) indicate desirable gaps; bars extending downward below the Average indicate undesirable gaps.
- The gaps are arranged from most to least desirable. Thus, outcomes to the right indicate potential areas for improvement.

Gap Barchart of Outcomes



*Note.* In the barchart shown above the gap scores for the negative individual outcomes (i.e., role conflict, stress, and job insecurity) are reversed so that, for all outcomes, positive differences indicate desirable gaps and negative differences indicate undesirable gaps.

Step 1a: Assess the Need for Change

Review the Gap Barchart shown on the previous page. On the list below, mark a check next to those outcomes along which Sample Company scored within the undesirable range.

**Individual Outcomes:**

- Role clarity
- Motivation
- Satisfaction
- Intention to stay
- Role conflict
- Job insecurity
- Stress

**Group Outcomes:**

- Intra-unit teamwork
- Inter-unit coordination
- Departmental-level quality

**Organizational Outcomes:**

- Organizational-level quality
- External adaptability

Step 1b: Identify Additional Indicators

Beyond the list identified above, what other outcomes have you seen that indicate a need for change and improvement within Sample Company?

**Additional Indicators:**

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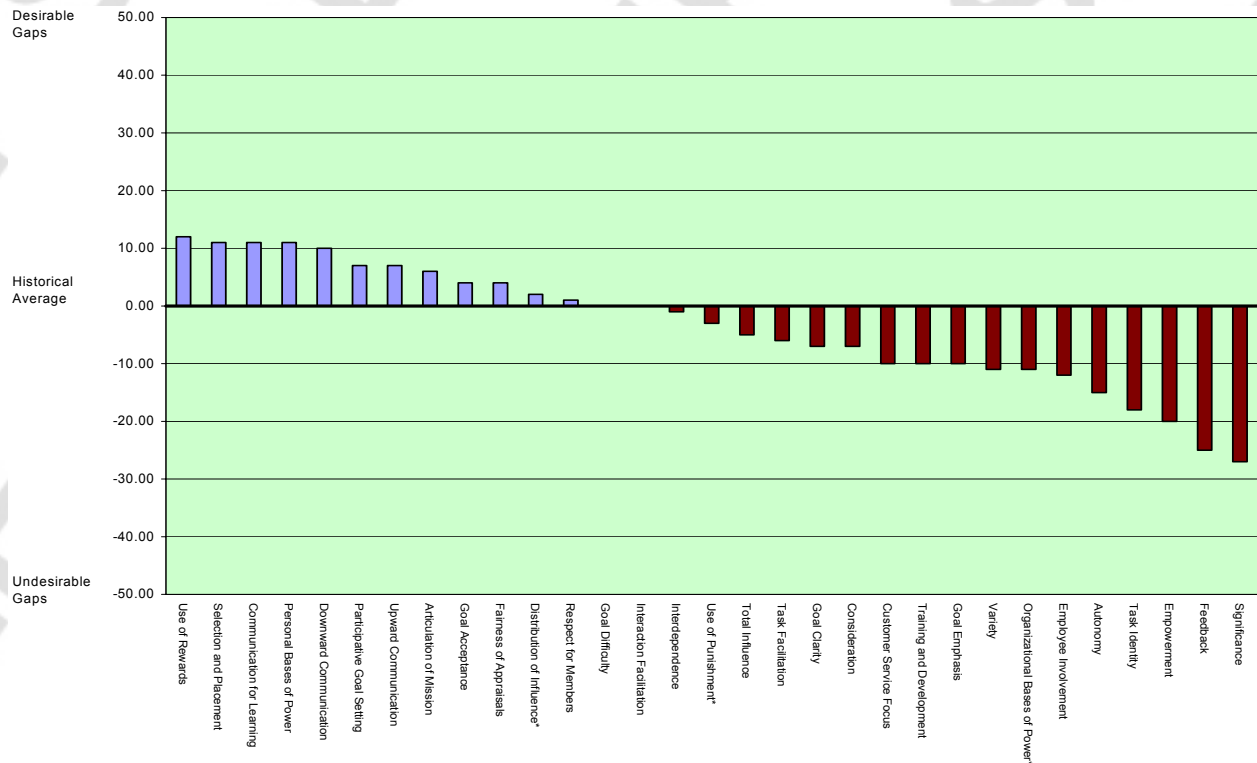
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## Identifying Levers for Change

The barchart below shows Sample Company's percentile score for each causal factor based on a comparison to the scores of 1084 other organizational units. The barchart below highlights the gaps between Sample Company's causal factor results and the results of the average organization in the following ways:

- Bars extending above the Historical Average (0.00) indicate desirable gaps; those extending below indicate undesirable gaps.
- The gaps are arranged from most to least desirable. Causal factors further toward the right are likely misaligned with the organization's values, promote norms for defensive (rather than productive) behaviors, and prevent the organization from achieving its goals. Thus, these factors could be important levers for change.

Gap Barchart of Causal Factors



Note. In the barchart shown above the gap scores for distribution of influence, use of punishment, and organizational bases of power are reversed so that, for all causal factors, positive differences indicate desirable gaps and negative differences indicate undesirable gaps.

Step 3a: Identify Levers Related to the First Target for Improvement

Review the Gap Barchart of Causal Factors, focusing particularly on those factors with undesirable gaps. Identify which causal factors are most likely preventing Sample Company from achieving the goals associated with its *first* target for improvement (identified in Step 2b.)\* Describe how these factors can be modified or changed to facilitate the achievement of Sample Company's goals for improvement.

Causal Factor 1:

Ways this factor can be modified to become a lever for change:

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Causal Factor 2:

Ways this factor can be modified to become a lever for change:

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Causal Factor 3:

Ways this factor can be modified to become a lever for change:

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\*Reviewing the item level results presented in Section 2 will provide you with a deeper understanding of these factors. In addition, Appendix A presents correlations between Sample Company's causal factor and outcome results. You may want to consider these correlations when identifying levers for change. However, because the correlations are based only on Sample Company's, they should be interpreted with caution, particularly if the sample size is small or if there is little variance in the outcomes or causal factors across subgroups.

Step 4d: Increase Confidence

Focusing particularly (but not exclusively) on those areas in which confidence is likely to be a problem, outline some strategies for promoting positive expectations for change. For example,

What can Sample Company do to assure that people have the knowledge and skills necessary to implement the proposed changes?

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Who are the key opinion leaders within the organization and how can they help to increase members' confidence in Sample Company's ability to change?

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Are there success stories (either internal or external to the organization) that can be shared with members?

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# Causal Factors (Subgroups)

5

This section contains Sample Company's causal factor results broken down by subgroups. Combined with the information provided in other sections of the report, the results presented in this section can help you to:

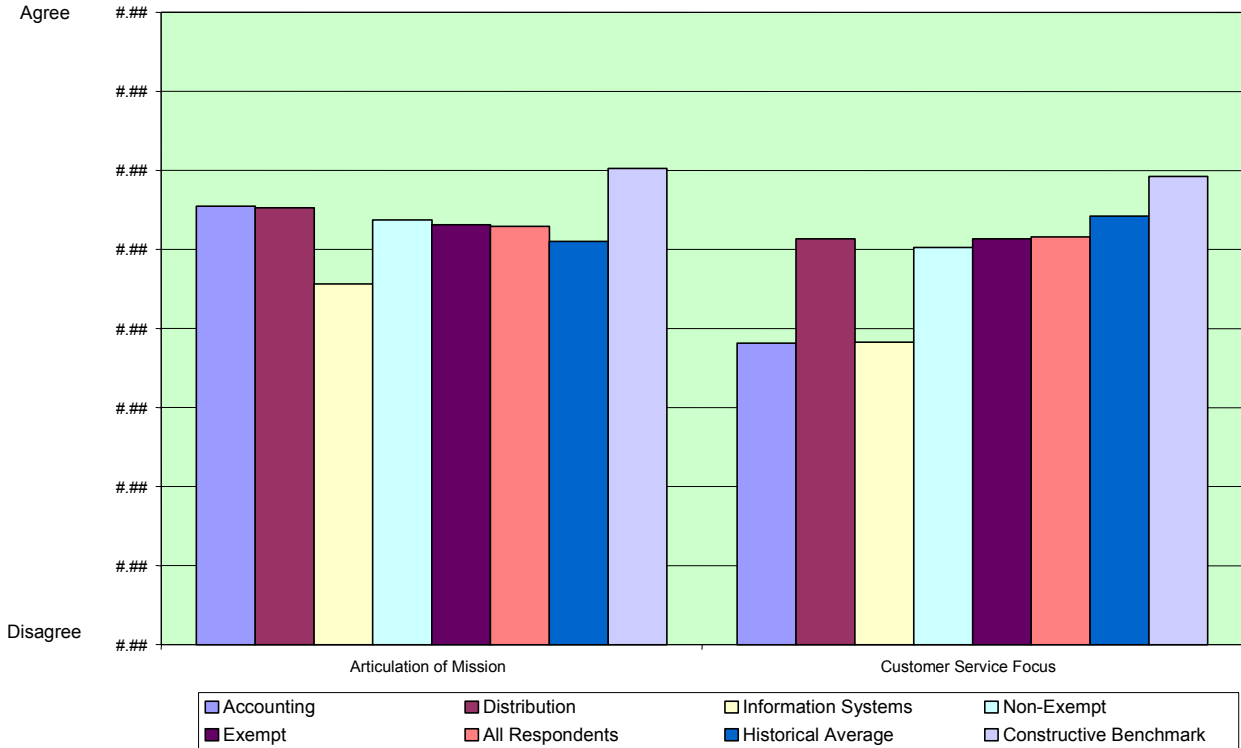
- determine the extent to which causal factor results at the organizational level (Section 2) are consistent across subgroups,
- uncover the factors that lead some subgroups to perform differently from others along outcomes (as described in Section 6), and
- identify how levers for achieving organizational goals for improvement may need to differ for particular subgroups (as outlined in Section 4).

The subgroup results are presented in two sets of barcharts and tables. The first set compares the results of each subgroup to one another, the organization as a whole ("All Respondents"), the Historical Averages, and the Constructive Benchmarks *one causal factor at a time*. These charts and tables make it easy to identify similarities, as well as differences, across subgroups along the OEI causal factors.

The second set of barcharts summarizes *all of the causal factor results* at once for each subgroup as compared to the Historical Averages. The tables that accompany these charts compare the subgroups' results to All Respondents, the Historical Averages, and the Constructive Benchmarks. In addition, the tables identify subgroup results that are significantly different (based on *Student t-tests*) from those of all the other subgroups combined. Unless Sample Company surveyed all or most of its population (in which case any observed differences are significant), the results of the *t-tests* are important because they indicate the likelihood that any differences observed between subgroups are significant, rather than due to chance or sampling error. Thus, the second set of barcharts and tables are especially useful for identifying both the factors that are influencing the outcomes achieved by particular subgroups and the levers for change that are appropriate for these subgroups.

Descriptions of the Historical Averages, the Constructive Benchmarks, and the causal factors measured by the OEI are provided in Section 2 of this report. Suggestions for identifying levers for change are

Mission and Philosophy (Subgroups)



Data Removed From Sample Report

	Grp. 1	Grp. 2	Grp. 3	Grp. 4	Grp. 5	All Resp.	Hist. Avg.	Const. Benchmk
<b>Articulation of Mission</b>	<b>###</b>	<b>###</b>	<b>###</b>	<b>###</b>	<b>###</b>	<b>###</b>	<b>###</b>	<b>###</b>
Objectives/priorities are clear and understood by members	<b>###</b>	<b>###</b>	<b>###</b>	<b>###</b>	<b>###</b>	<b>###</b>	<b>###</b>	<b>###</b>
People have a clear understanding of mission and role	<b>###</b>	<b>###</b>	<b>###</b>	<b>###</b>	<b>###</b>	<b>###</b>	<b>###</b>	<b>###</b>
Widely-shared philosophy provides employees an understanding	<b>###</b>	<b>###</b>	<b>###</b>	<b>###</b>	<b>###</b>	<b>###</b>	<b>###</b>	<b>###</b>
Ceremonies are held to celebrate outstanding work	<b>###</b>	<b>###</b>	<b>###</b>	<b>###</b>	<b>###</b>	<b>###</b>	<b>###</b>	<b>###</b>
Members' actions illustrate philosophy and priorities	<b>###</b>	<b>###</b>	<b>###</b>	<b>###</b>	<b>###</b>	<b>###</b>	<b>###</b>	<b>###</b>
<b>Customer Service Focus</b>	<b>###</b>	<b>###</b>	<b>###</b>	<b>###</b>	<b>###</b>	<b>###</b>	<b>###</b>	<b>###</b>
Your department is responsible for client satisfaction	<b>###</b>	<b>###</b>	<b>###</b>	<b>###</b>	<b>###</b>	<b>###</b>	<b>###</b>	<b>###</b>
You are encouraged to emphasize the perspective and needs of customers	<b>###</b>	<b>###</b>	<b>###</b>	<b>###</b>	<b>###</b>	<b>###</b>	<b>###</b>	<b>###</b>
You are relied on to provide information about customers	<b>###</b>	<b>###</b>	<b>###</b>	<b>###</b>	<b>###</b>	<b>###</b>	<b>###</b>	<b>###</b>
Your organization relies on you to help win customers and generate sales	<b>###</b>	<b>###</b>	<b>###</b>	<b>###</b>	<b>###</b>	<b>###</b>	<b>###</b>	<b>###</b>
The organization responds effectively to changing needs of clients	<b>###</b>	<b>###</b>	<b>###</b>	<b>###</b>	<b>###</b>	<b>###</b>	<b>###</b>	<b>###</b>

**Scale scores are in boldface and are shaded.**

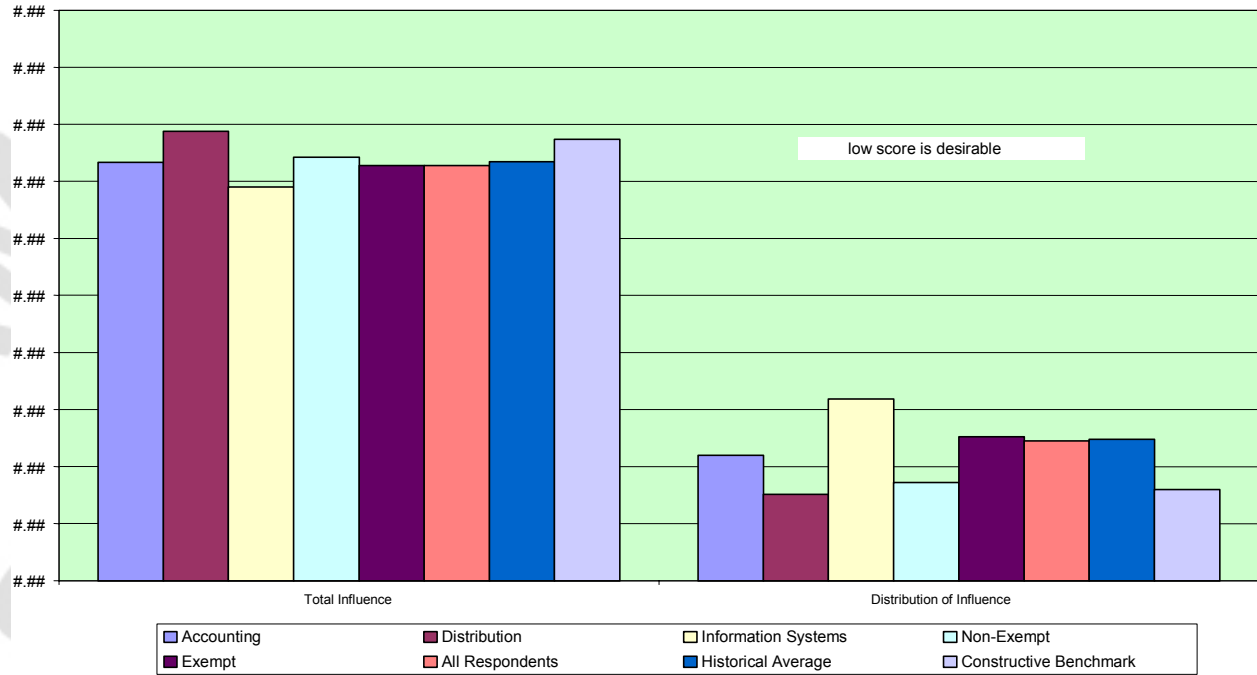
Item scores are listed below scale scores.

For Articulation of Mission, Item and scale scores can range from 1 ("disagree") to 5 ("agree"). For Customer-Service Focus, item and scale scores can range from 1 ("not at all") to 5 ("to a very great extent").

**Subgroup Key:**

- Grp. 1 Accounting
- Grp. 2 Distribution
- Grp. 3 Information Systems
- Grp. 4 Non-Exempt
- Grp. 5 Exempt

Influence (Subgroups)



Data Removed From Sample Report

	Grp. 1	Grp. 2	Grp. 3	Grp. 4	Grp. 5	All Resp.	Hist. Avg.	Const. Benchmk
<b>Total Influence</b>	<b>#.##</b>	<b>#.##</b>	<b>#.##</b>	<b>#.##</b>	<b>#.##</b>	<b>#.##</b>	<b>#.##</b>	<b>#.##</b>
<b>Distribution of Influence</b>	<b>#.##</b>	<b>#.##</b>	<b>#.##</b>	<b>#.##</b>	<b>#.##</b>	<b>#.##</b>	<b>#.##</b>	<b>#.##</b>
The employees	<b>#.##</b>	<b>#.##</b>	<b>#.##</b>	<b>#.##</b>	<b>#.##</b>	<b>#.##</b>	<b>#.##</b>	<b>#.##</b>
Their immediate supervisors	<b>#.##</b>	<b>#.##</b>	<b>#.##</b>	<b>#.##</b>	<b>#.##</b>	<b>#.##</b>	<b>#.##</b>	<b>#.##</b>
Higher-Level Managers	<b>#.##</b>	<b>#.##</b>	<b>#.##</b>	<b>#.##</b>	<b>#.##</b>	<b>#.##</b>	<b>#.##</b>	<b>#.##</b>

**Scale scores are in boldface and are shaded.**

Scores reflecting the influence of members at different organizational levels are listed below the scale scores.

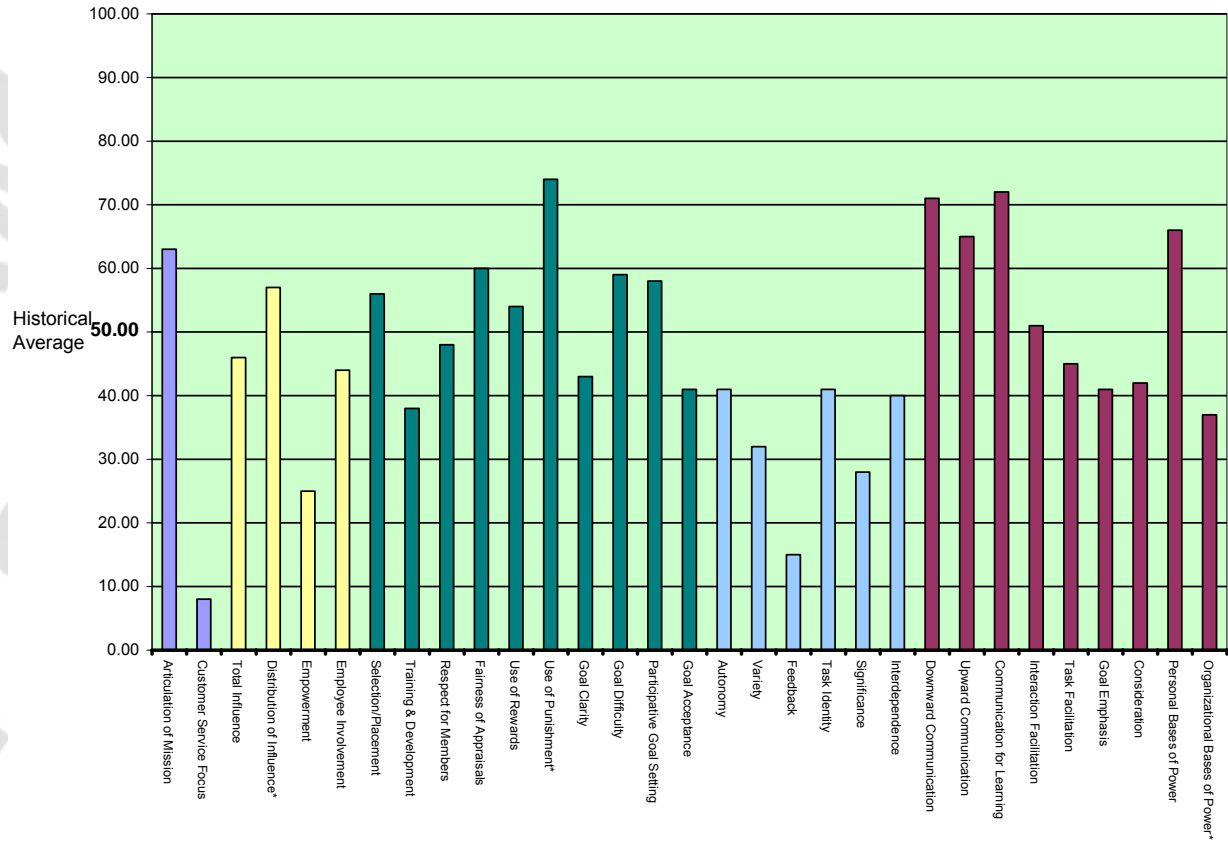
For the Total Influence scales and the items, scores can range from 1 ("no influence at all") to 5 ("very great influence"). For the Distribution of Influence scale, scores are based on the difference between the influence of *higher-level managers* versus *the employees* (i.e. the influence of higher-level managers minus the influence of the employees).

**Subgroup Key:**

- Grp. 1 Accounting
- Grp. 2 Distribution
- Grp. 3 Information Systems
- Grp. 4 Non-Exempt
- Grp. 5 Exempt

Accounting

Summary Barchart of Causal Factors (Percentile Scores)



\* In the barchart above, the percentile scores for distribution of influence, use of punishment, and organizational bases of power are reversed so that, for all causal factors, higher percentile scores signify more desirable results.

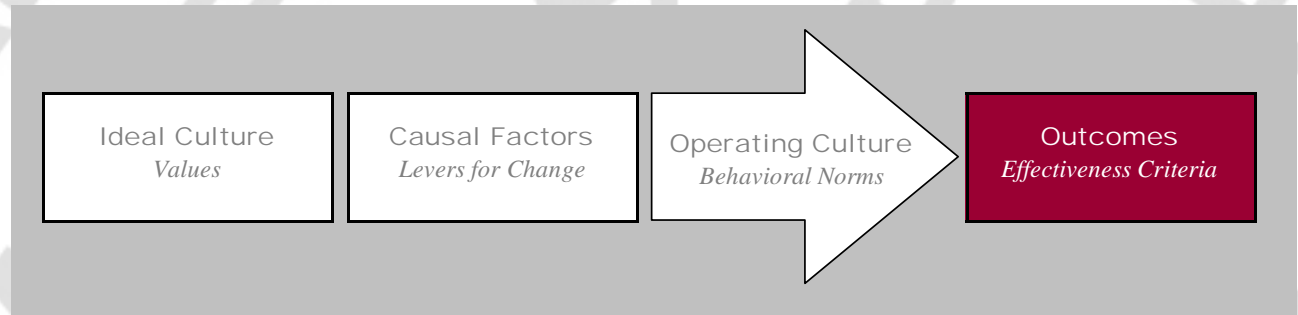
Accounting  
Summary of Causal Factors (Raw Scores)

Data Removed From Sample Report

	Historical Average	Constructive Benchmark	All Respondents	This Subgroup	Significant Differences <sup>a</sup>
<b>Mission and Philosophy</b>					
Articulation of Mission	###	###	###	###	NS
Customer Service Focus	###	###	###	###	***
<b>Structures</b>					
Total Influence	###	###	###	###	NS
Distribution of Influence <sup>b</sup>	###	###	###	###	NS
Empowerment	###	###	###	###	NS
Employee Involvement	###	###	###	###	NS
<b>Systems</b>					
Selection/Placement	###	###	###	###	NS
Training & Development	###	###	###	###	NS
Respect for Members	###	###	###	###	NS
Fairness of Appraisals	###	###	###	###	NS
Use of Rewards	###	###	###	###	NS
Use of Punishment <sup>b</sup>	###	###	###	###	**
Clear and Specific Goals	###.###	###.###	###.###	###.###	N/A
Fairly Challenging Goals	###.###	###.###	###.###	###.###	N/A
Jointly Set Goals	###.###	###.###	###.###	###.###	N/A
Fully Accepted Goals	###.###	###.###	###.###	###.###	N/A
<b>Technology</b>					
Autonomy	###	###	###	###	NS
Variety	###	###	###	###	NS
Feedback	###	###	###	###	NS
Task Identity	###	###	###	###	NS
Significance	###	###	###	###	NS
Interdependence	###	###	###	###	NS
<b>Skills/Qualities</b>					
Downward Communication	###	###	###	###	NS
Upward Communication	###	###	###	###	NS
Communication for Learning	###	###	###	###	NS
Interaction Facilitation	###	###	###	###	NS
Task Facilitation	###	###	###	###	NS
Goal Emphasis	###	###	###	###	NS
Consideration	###	###	###	###	NS
Personal Bases of Power	###	###	###	###	NS
Organizational Bases of Power <sup>b</sup>	###	###	###	###	NS

<sup>a</sup>Significance is based on *Student t-tests* that compare the subgroup's scores to the scores of the other subgroups combined. Subgroup scores that are significantly different from the scores of the rest of the subgroups are indicated by asterisks in the last column (\* $p < .05$ ; \*\* $p < .01$ ; \*\*\* $p < .001$ ). Non-significant differences are indicated by "NS". The t-tests are not applicable ("N/A") to the goal setting scores since they represent percentages rather than mean scores.

<sup>b</sup>Lower scores are more desirable for these measures.



# Outcomes (Subgroups) 6

**T**his section contains Sample Company's OEI results for outcomes broken down by subgroups. These results can be used to:

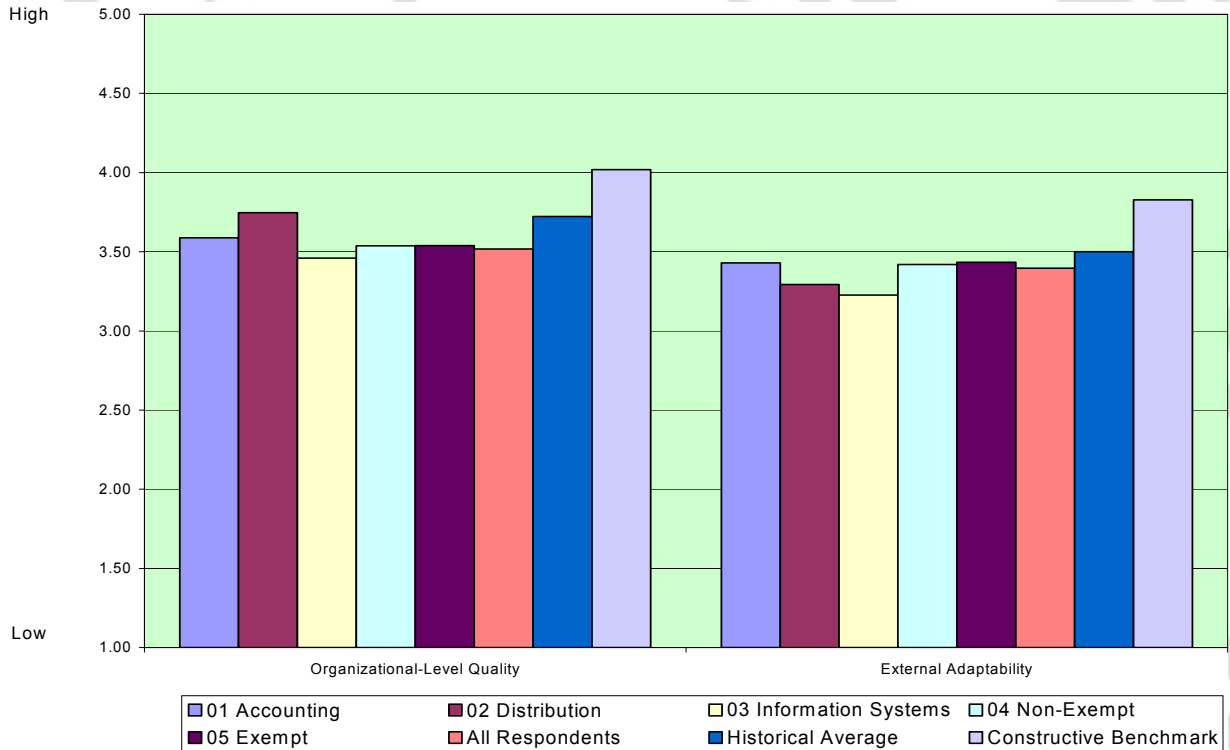
- determine the extent to which Sample Company's results along outcomes are consistent across subgroups,
- examine how the causal factors of specific subgroups (as described in Section 5) have impacted their effectiveness,
- assess the needs for change in specific subgroups, and
- establish additional targets and goals for improvement at the subgroup level (as described in Section 4).

Included in this section are two sets of barcharts and tables. The first set compares the outcome results of each subgroup to one another, the organization as a whole ("All Respondents"), the Historical Averages, and the Constructive Benchmarks along *one outcome at a time*. Thus, these charts can be used to identify trends across subgroups with respect to individual, group, and organizational outcomes.

The second set of barcharts summarizes *all of the outcome results* at once for each subgroup as compared to the Historical Averages. The tables that accompany these charts compare the subgroups' results to All Respondents, the Historical Averages, and the Constructive Benchmarks. They also highlight subgroup results that are significantly different (based on *Student t-tests*) from those of all the other subgroups combined. The results of the *t-tests* are important because, unless Sample Company surveyed all or most of its population (in which case any observed differences are significant), they indicate the likelihood that any observed differences are significant, rather than due to chance or sampling error. Thus, this second set of charts and tables is useful for assessing each subgroup's needs for improvement and establishing additional targets and goals for change.

Descriptions of the Historical Averages, the Constructive Benchmarks, the outcomes measured by the OEI, and their implications are provided in Section 3 of this report. Suggestions for assessing the need for change and establishing additional targets and goals for

Organizational Outcomes (Subgroups)



Data Removed From Sample Report

	Grp. 1	Grp. 2	Grp. 3	Grp. 4	Grp. 5	All Resp.	Hist. Avg.	Const. Benchmk
<b>Organizational-Level Quality</b>	###	###	###	###	###	###	###	###
Your organization has a reputation for superior customer service	###	###	###	###	###	###	###	###
Your organization will get repeat business from its present customers	###	###	###	###	###	###	###	###
You would recommend this organization to potential customers	###	###	###	###	###	###	###	###
The quality of your organization's products/services meets customer expectations	###	###	###	###	###	###	###	###
*The quality of products/services is inconsistent – subject to variability	###	###	###	###	###	###	###	###
You would choose to do business with your organization (if you were in the market)	###	###	###	###	###	###	###	###
<b>External Adaptability</b>	###	###	###	###	###	###	###	###
New programs are quickly and efficiently implemented	###	###	###	###	###	###	###	###
This organization proactively identifies and adjusts to changes	###	###	###	###	###	###	###	###
This organization responds effectively to external opportunities and threats	###	###	###	###	###	###	###	###

Scale scores are in boldface and are shaded.

Item scores are listed below scale scores.

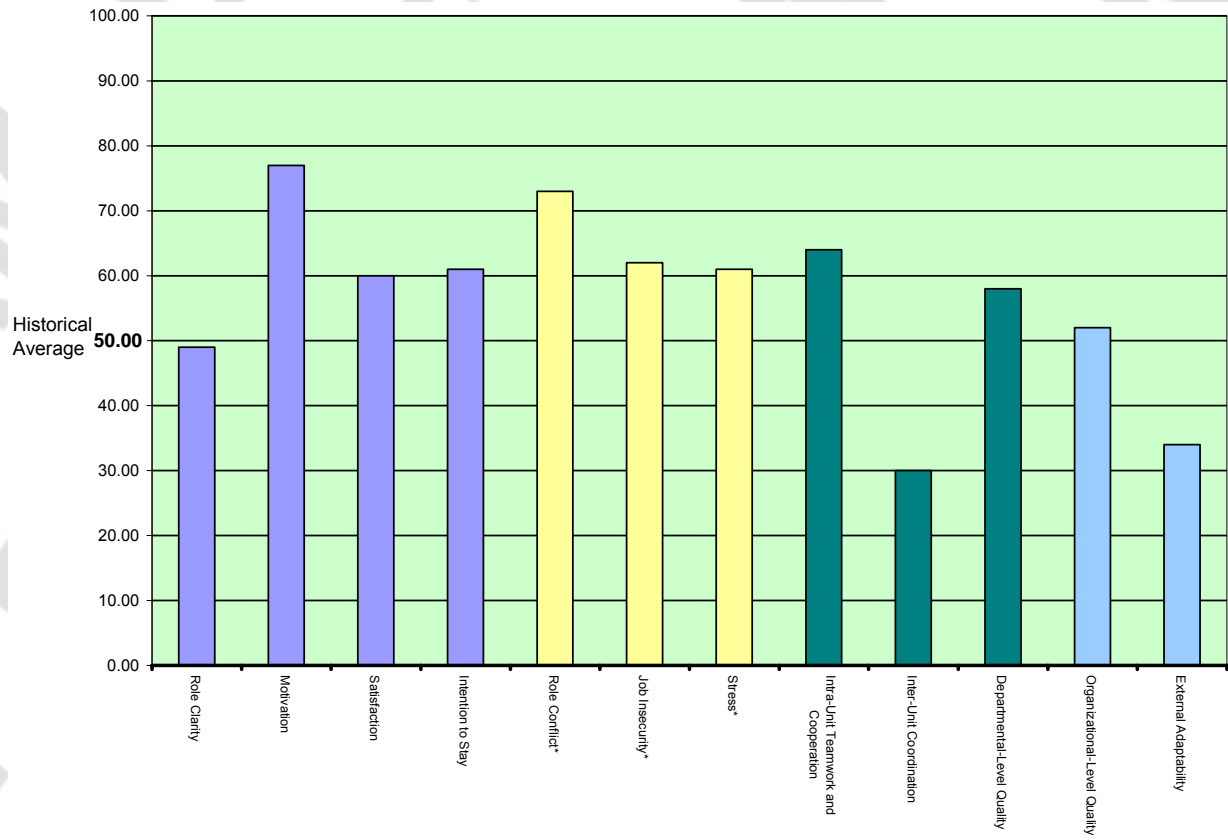
Item and scale scores can range from 1 ("disagree/not at all") to 5 ("agree/to a very great extent").

\*Scores for these items are presented in raw form (but were reversed when calculating scale scores).

Subgroup Key:

- Grp. 1 Accounting
- Grp. 2 Distribution
- Grp. 3 Information Systems
- Grp. 4 Non-Exempt
- Grp. 5 Exempt

Distribution  
 Summary Barchart of Outcomes (Percentile Scores)



\* In the barchart shown above, the percentile scores for negative individual outcomes were reversed so that, for all scales, higher percentile scores signify more desirable results.

Distribution  
 Summary of Outcomes (Raw Scores)

Data Removed From Sample Report

	Historical Average	Constructive Benchmark	All Respondents	This Subgroup	Significant Differences <sup>a</sup>
<b>Positive Individual Outcomes</b>					
Role Clarity	###	###	###	###	*
Motivation	###	###	###	###	***
Satisfaction	###	###	###	###	*
Intention to Stay	###	###	###	###	NS
<b>Negative Individual Outcomes</b>					
Role Conflict	###	###	###	###	NS
Job Insecurity	###	###	###	###	**
Stress	###	###	###	###	NS
<b>Group Outcomes<sup>b</sup></b>					
Intra-Unit Teamwork and Cooperation	###	###	###	###	NS
Inter-Unit Coordination	###	###	###	###	NS
Departmental Level Quality	###	###	###	###	***
<b>Organizational Outcomes</b>					
Organizational Level Quality	###	###	###	###	*
External Adaptability	###	###	###	###	NS

<sup>a</sup>Significance is based on *Student t-tests* that compare the subgroup's scores to the scores of the other subgroups combined. Subgroup scores that are significantly different from the scores of the other subgroups are indicated by asterisks in the last column (\*p<.05; \*\*p<.01; \*\*\*p<.001). Non-significant differences are indicated by "NS".

<sup>b</sup>Lower scores are more desirable for these measures.

This report was prepared exclusively for the use of  
Sample Company

By

Human Synergistics/Center for Applied Research, Inc.  
216 W. Campus Drive, Suite 102  
Arlington Heights, IL 60004  
Tel 847.590.0995  
Fax 847.590.0997  
Email [info@hscar.com](mailto:info@hscar.com)  
Web <http://www.hscar.com>

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