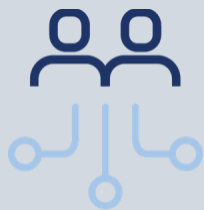


Sample Summary Report Prepared for Distribution to Staff
(the full report for leadership is 50 pages)



OCCUMETRICS

Listen and Learn from Your Workforce

A summary report prepared for the staff of

Agency Y

*Respectfully submitted by Kenton J. Beachy, MA, MPA
Executive Director, Mental Health America of Franklin County*

From August through October 2017, Mental Health America of Franklin County explored¹ employee workplace wellbeing at Agency Y in response to interest on the part of the agency's management in providing a healthy work environment and reducing staff turnover².

Our assessment found several areas of stronger workplace wellbeing, along with several areas of lower workplace wellbeing. We've identified several areas likely to increase staff retention that will interrupt the cycle of feeling overworked, burning out, and quitting, which then cause the remaining staff to feel even more overworked and burnt out. Our study found that about 45% of those who responded to the survey reported having at least sometimes thought about quitting and also actively looked for another job. Agency Y's management is interested in better understanding what employees are experiencing, which is why they requested this study. Likewise, they felt it important for the staff to see the results and recommendations of our assessment first hand, which is why you are receiving this report.

Briefly, our study of workplace wellbeing focused on the following areas:

- **Emotional Exhaustion**—the extent to which employees feel burnt out
- **Work Engagement**—the extent to which employees are involved, committed, enthusiastic and focused
- **Supervisor Support and Colleague Support**—the extent to which colleagues and managers support and encourage each other and their supervisees
- **Work Demands**—the extent of requirements on staff concerning hours, deadlines, quantity of work, taking breaks, and time pressures
- **Control/Autonomy**—how much independence staff has in how they do their jobs
- **Interpersonal Relationships**—the nature of workplace relationships, such as friction, harassment, and bullying
- **Job Role**—the extent to which employees understand their duties and responsibilities and fit into the bigger organizational framework
- **Organizational Change**—the extent of employee involvement with organizational change and how they perceive fairness in organizational decision-making
- **Distributive Justice**—the extent to which employees perceive fairness in their pay, praise, etc.
- Overall **job satisfaction**
- Satisfaction with **pay and benefits**
- **Turnover intention**—the extent to which employees think about quitting and actually look for another job

Our analysis of the survey data found that overall job satisfaction, work engagement, satisfaction with pay and benefits, interpersonal relationships, work demands, distributive justice, and job demands have the most impact on retention. Similarly, work engagement, job role, satisfaction with pay and benefits, interpersonal relationships, organizational change, and work demands have the most impact on job satisfaction.

Our focus group conversations provided more detail about workplace and turnover dynamics. In particular, staff members expressed the strongest motivation from

- The mission-driven work
- Engaging with clients and seeing improvement
- Flexibility and autonomy
- Mostly supportive coworkers and supervisors
- Ability to grow within the company

On the other hand, staff members expressed discouragement from

- Feeling underpaid
- Feeling short-staffed and overworked
- Feeling unimportant and undervalued
- The lengthy and inefficient hiring process
- Experiencing poor communication from the top down and among departments and locations, as well as a lack of clear and considerate communication from senior management

¹ The study included three survey groups (total 69% response rate or 534 out of 771 staff members responding; +/- 2.2% margin of error), 15 follow-up one-hour focus groups with 144 employees, interviews with six VPs and the CEO, and a records review analyzing turnover rates and exit interview data.

² Voluntary termination (i.e., choosing to quit rather than being fired) rates were 37.8% in FY15, 41.9% in FY16, and 36.3% in FY17. These compare to rates ranging from 10-50% across a sampling of other behavioral health agencies across Ohio.

You may be interested in seeing some of the high-level data results from the survey. Results have been scored so that a high score is always better. Following is how respondents on the survey scored³ on a scale of 0 (lowest) to 6 (highest) with the elements of workplace wellbeing, compared to the scores of other agencies across Ohio:

	Agency Y All Divisions	Division 1	Division 2	Division 3	Statewide*
	<i>Mean</i>				
Job Role	4.80	5.09	4.81	4.55	4.87
Interpersonal Relationships	4.62	4.40	4.81	4.64	4.80
Supervisor Support	4.20	4.30	4.07	4.11	4.29
Colleague Support	4.16	4.17	4.06	4.24	4.38
Control/Autonomy	3.95	3.94	4.20	3.71	3.78
Work Engagement	3.60	3.69	3.57	3.55	3.68
Work Demands	3.38	3.70	3.56	2.95	3.40
Emotional Exhaustion	2.93	3.03	3.00	2.79	3.05
Organizational Change	2.92	3.19	2.96	2.37	3.09
Distributive Justice	2.92	2.92	3.04	2.81	3.39
Workplace Wellbeing	3.74	3.82	3.79	3.57	3.86

	Agency Y All Divisions	Division 1	Division 2	Division 3	Statewide*
	<i>Mean</i>				
Overall, how satisfied are you with your current job?	3.87	4.15	3.97	3.54	4.17
How satisfied are you with your pay?	2.19	2.07	2.45	2.07	2.94
How satisfied are you with your benefits, such as paid time off, medical and dental insurance, retirement plan, and other fringe benefits?	3.71	3.69	3.77	3.67	3.78

	Agency Y All Divisions	Division 1	Division 2	Division 3	Statewide*
	<i>Mean</i>				
I think about quitting my job.	3.50	3.61	3.69	3.22	3.67
I am actively looking for another job outside of my organization.	4.07	4.18	4.09	3.95	4.12
Turnover Intention	3.78	3.90	3.88	3.58	3.98

*1,739 employees in 14 other Ohio behavioral health agencies

Taking this staff feedback into account, we've made a variety of recommendations to Agency Y's leadership in different areas such as compensation, hiring, and communications, all of which are designed for an organizational culture that values trust, integrity, building strong staff member relationships, and good mental health. In the coming weeks, the Management Team will carefully evaluate our recommendations and work with you on prioritizing and communicating a plan of action that has the financial and staff resources necessary to deliver on.

³ For workplace wellbeing and turnover intention: 0 = Never | 1 = Almost never | 2 = Rarely | 3 = Sometimes | 4 = Often | 5 = Very often | 6 = Always. For job satisfaction and satisfaction with pay and benefits: 0 = Very dissatisfied | 1 = Dissatisfied | 2 = Somewhat dissatisfied | 3 = Neither dissatisfied nor satisfied | 4 = Somewhat satisfied | 5 = Satisfied | 6 = Very satisfied.

TESTIMONIALS

Netcare Access

"In the prior year, our turnover rate hit a high of 51% after being in the 30's for some time. The MHA review gave us the opportunity to identify some areas that we could work on in a targeted approach. By incorporating many of the recommendations contained in the report, we reduced our 2016 turnover rate to 38.7%. We are continuing to utilize the recommendations in order to reduce turnover to even more manageable levels in 2017 and beyond. Working with MHA was easy from an administrative standpoint and did not tax our staff or our resources. Highly recommend without reservation."

- King Stumpp, President & CEO

The Centers for Families and Children

"The study and its methods were key in helping us to understand some progress we had made in the last couple years as well as the work we must do to continue to increase wellbeing for our team. The study has placed important emphasis on key action items only some of which we might have come to through thoughtful reflection and observation, but others which we might not have got to the root of and indeed not so quickly. Now having this focus allows us to allocate already limited resources to the best places for results. Thank you for your candor and professionalism. I'm not sure this letter or any other can adequately complement the soft yet emphatic approach you take in your consultation. It is much appreciated."

- Kerry Bohas, PHR, SHRM-CP, Vice President, Human Resources

Alta Care Group, Inc.

"The entire process was well organized, flexible to accommodate our staff and schedule needs, and completed with an outstanding level of both verbal and written communication. This study turned out to be an incredible management tool for our 200 employees. It was a comprehensive process that included staff surveys, on-site staff focus groups, and review of a significant amount of our data (e.g. exit interviews, turnover rates). In the end, the very detailed report provided us with a deep level of understanding of those contributors to staff turnover intention, as well as very practical strategies to proactively promote staff retention. Thank you MHA of Franklin County!"

- Joe Shorokey, LPCC-S, CEO

UMCH Family Services

"We have found the process and the outcomes to be an effective tool to better understand our staff and then involve them in improving our circumstances together. I would recommend this process to anyone attempting to better understand their staff's wellbeing and identify ways to work together to reduce turnover."

- Sean Reilly, Executive Director

Child Focus, Inc.

"Our agency found the assessment to be extremely valuable to senior leadership and staff. Understanding what experiences and priorities our staff value most helps us understand how to have a healthy, happy workforce and a workforce that remains with Child Focus! Thanks to Kenton Beachy we now have a direction to proceed in. Before this assessment our efforts with respect to retention, wellbeing and engagement may have taken us in multiple directions. However, armed with the data from the survey and focus groups we now know how to position our sails. Child Focus highly recommends this assessment to other agencies who are vested in the wellbeing of their staff."

- Jeff Finke, Human Resource Director

Concord Counseling Services

"The information from the study helped us in deciding what we could and should look at to improve retention at Concord. In particular, we have looked at ways to provide more feedback to line staff and to push decision making down to the manager level. Without the information provided by the study, it is doubtful we would have realized how important these and other changes could be."

I also want to thank you and your staff for the professionalism and consideration you demonstrated throughout the process. At the end you had to deliver some results that needed a "diplomatic" touch. You were patient and tactful at all times and throughout the entire process. I highly recommend this process for any organization interested in improving their workplace wellbeing!"

- Connie Emerson, LISW-S, Executive Director

FrontLine Services

"The plan of action has been very helpful in guiding the agency's decision making. We have used your input in creating professional development for senior and middle management. The staff interviews gave us real insight into the struggles the staff were going through. It was helpful to have an outside group come in to get real feedback."

Also, all of your follow-up after the project was above and beyond. You extended yourself and offered additional help and clarification of the survey results. I highly recommend this process for employers that really want to hear what the staff are saying and want to make real changes in the workplace."

- Meredith Black, Director of Human Resources