Measuring Employee Satisfaction and Engagement:
Lessons from a Sonoma County Staff Survey

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EXECUTIVE SUMMARY

This report outlines the Sonoma County Human Services Department's process for collecting and reporting on staff satisfaction and engagement in support of the Agency's Strategic Vision. The report focuses on the development, implementation and dissemination of results of the department's annual All-Staff Survey.

Project Description

The Sonoma County Human Services Department first introduced its annual All-Staff Survey in 2007, followed by a second survey in 2008. During this time the survey tool was further refined based on feedback collected from staff and management. This case study examines the origins of the survey, its purpose, the evolution of the tool, its role in the management of the organization, and, most importantly, important observations by the Sonoma County leadership on the overall survey process. The report also focuses on opportunities these lessons can provide in implementation of an employee satisfaction process within the San Mateo County Human Services Department.

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Introduction

Many of us have heard the slogan "Be all you can be." It is a slogan made famous in the U.S. Army recruiting campaign that began in the late 1990's. What many do not know is that it is based on a quote by the famous psychologist, Abraham Maslow, who stated, "What a man can be, he must be." This quote is of particular importance to any organization which is considering the idea of measuring employee satisfaction, because it speaks to the core question which is always asked—"why?"

For the San Mateo County, Human Services Agency, this question was partially answered in the process of conducting an agency-wide assessment done in support of an agency accreditation process. The accrediting body, the Council on Accreditation, had identified a process of establishing personnel satisfaction goals and measuring personnel satisfaction as a "best practice." Not having a formal process in place, this was cited as an area of improvement by the Council as one of its findings. As a result, the agency set forth to develop a survey tool in order to comply with the recommendations. The larger question still remained, however—why measure employee satisfaction at all?

In the case of the County of Sonoma Human Services Department (HSD), it is the agency goal of HSD staff to encourage all to feel supported, valued, safe and happy at work. It is this goal that also helps drive the effort to measure employee satisfaction through an All-Staff survey. Still, this survey only serves as an indicator or a small window to staff perception. Without a real understanding of why we measure, it is useful to measure one might not know how to most effectively use information collected through a survey tool.

The question of why we measure was one of the primary focuses of my internship with Sonoma County. The initial discussions with the executive team revealed that the director, Jo Weber, had established a staff goal of having "staff feel valued, safe and are happy to work at HSD." While this may seem a very common sense goal, further discussion with the HSD leadership team revealed this to be part of a much more comprehensive approach to staff engagement.

One important factor in all of this was the fact that Jo Weber had only recently become the director of the agency. Her leadership style is one of engagement and collaboration, and her vision for the organization is one in which staff felt empowered to achieve. It was considered essential that staff satisfaction and engagement be measured to better understand how to effectively help foster this culture.

In addition to spending time in Sonoma County studying the process, I also researched additional information on employee satisfaction. One facet of the research included studying the work of Abraham Maslow. Abraham Maslow theorized that in every person there is an inherently strong desire to realize his or her potential rather than just blindly reacting to a situation, hence the quote "What a man can be, he must be." He went on to construct a list of humanistic needs, which he called the "hierarchy of needs," ranging from the most basic physical needs to the most comprehensive psychological needs in ascending order. Individuals whose baser needs are met are able to pursue the fulfillment of their higher needs, which include creativity and achievement. Maslow also theorized that individuals with unfilled base needs would be inhibited from pursuing higher level goals.

It was soon realized that the goal of the HSD leadership was to create an environment that fosters creativity and innovation—not just a transactional workplace in which people come to meet their basic needs, but a transformational workplace in which people come to fulfill their higher level aspirations. Often times, constraints can stand in the way of this. The survey itself is a tool designed to help understand what unique barriers exist within an organization.

Development of the Survey Process

A significant part of the internship was spent discussing the creation and implementation of the survey tool. Marla Stuart, Director of the Research, Planning and Evaluation Division, and Roy Redlich, Program Development Manger, both explained in detail how the survey tool was developed. One key point made in these discussions was that in order to be able to create an effective environment, one must first accurately understand what the barriers are. This makes it essential that the information solicited is accurately representing the intent of the questions asked. In the case of a survey tool, two issues become very important in regards to quality:

- **Reliability** That the information being provided is consistent. In other words the questions asked will not be interpreted to mean different things for different people. (Example: a ruler will consistently measure a quantity by the same amount)
- **Validity** The information being provided is measuring what it is supposed to measure. (Example: a broken ruler will consistently measure the same quantity but will still be wrong)

Roy also discussed the role of psychometrics in creating a proper survey tool. Psychometrics is the field of science which studies the theory and technique of psychological measurement. Much research has been done in this field, and the Planning and Evaluation Division chose to use existing and proven survey questions and formats to create the survey tool for the organization. The original survey contained thirty four questions representing the areas of leadership, working relationships, communication, professional development, diversity, and quality of

HSD services. The survey was piloted using Survey Monkey with a group of twenty five HSD staff in June of 2007.

Implementation, Analysis and Revision

A number of things where done to promote accuracy and participation in the survey including:

- Respondents could remain anonymous;
- Survey was kept short (73% of participants completed in 10 minutes);
- Responses were based on levels of agreement (Strongly Disagree, Disagree, Not Sure, Agree, Strongly Agree, and No Answer);
- The electronic format (Survey Monkey) was easily distributable and collectable, and
- Open ended comment sections where included.

As a result of these efforts, a majority of staff participated in the survey. Survey responses were analyzed both quantitatively and qualitatively. Careful consideration was taken into how to present the data in a way that was factual but also facilitated comprehension. Efforts were made to promote a "balanced" approach to survey analysis, given that a number of distinctly different programs and locations were represented in the survey. For example, open-ended comments were summarized into categories and ranked by number of responses. This allowed for objective analysis of the data while minimizing the risk of individual responses receiving unwarranted degrees of attention due to the nature of the comment. Responses were also categorized by employee classification (staff, supervisor, manager) and division. The reports where disseminated to the executive team for review, then managers. The results were shared with the organization through division meetings. The information was also shared with the unions. Feedback was collected by the Planning and Research Division on the receptiveness of each group to both the survey tool and the information provided. The information gathered was then used to develop a subsequent survey which was administered in June 2008. Changes included:

- Survey was shortened from 39 questions to 37;
- Nine questions were reworded into 12; and
- Bias and wording issues were addressed.

Surveys are, in a sense, a form of conversation as much as they are a tool for measurement. The expectation for most individuals is that once their opinion has been solicited, it will result in some form of action. In addition to providing the results to all staff, the leadership team responded in several ways. In one case, a "drill down" survey was implemented to further explore an area of focus. Other actions included the development of committees to look at ways of addressing staff concerns. Additionally, action steps taken in the areas of communication and staff participation. Most importantly, staff were kept informed of these action steps through staff meetings and updates. Subsequent surveys results can be used to determine the effectiveness of these actions.

Key Observations

In speaking directly with a number of directors within the organization regarding the survey and its implications, a number of important points were expressed:

- A number of directors were surprised to find a difference of opinion in some of the organization's perceived areas of strength.
- Through survey responses, many discovered areas of strength that they were not aware of previously.
- Some of the directors struggled with the initial reaction of taking the responses too personally at first.
- In many cases, the difference between staff responses and management's showed a distinct difference of opinion.
- Being able to quickly respond to the survey results, even if just to acknowledge the responses, was essential to establishing the authenticity of the effort with staff.
- Staff clearly expected some form of action as a result the survey.

Recommendations

The County of San Mateo Human Services Agency is committed to developing a process for collecting staff satisfaction information Sonoma County pro-

vides an excellent opportunity to build on lessons learned through implementation of a similar employee satisfaction survey. Of particular importance is the purpose served by the survey tool in helping to craft a transformational organizational culture. This same concept would be in keeping with the county's philosophy of a learning organization.

Based on these observations and my own assessment, I recommend HSA review the development of an employee satisfaction process based on the following assumptions:

- The leadership team establishes a mutually agreed upon understanding of what purpose the survey tool should serve for the organization's leadership.
- The development of the tool utilizes existing survey tools and expertise to develop a questionnaire that is both valid and reliable.
- All levels of staff, including management, are included in the development of the survey.
- The leadership team defines how the information gathered by the survey tool will be used by the leadership.
- The leadership assesses that all key stakeholders are prepared and capable of addressing issues that may be surfaced by the survey.
- A distinct process of communication is outlined at all levels of the organization to provide feedback on survey results and subsequent actions items.

Most importantly, the organization should assess its current circumstances and ability to dedicate the appropriate time and resources to incorporating the survey tool into the management process. This may require a significant change in the way the organization's leadership manages. The county should also recognize that there is more at risk then just creating an ineffectual management tool. If the process is not handled well, there is potential for negative consequences such as damaging the credibility of the organizations leadership or undermining the authenticity of employee/management dialogue. As such, the organization should incorporate the lessons learned from other counties, such as Sonoma County, into

any discussion, development, and implementation of an employee satisfaction survey process.

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Resources

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