

A shift to culture and leadership development solves engagement enigma



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The Facts

Organization

Advocate Health Care

Industry

Health Care (Not-for-profit)

Diagnostic Tools

Organizational Culture Inventory[®]
 (OCI[®]) and *Leadership/Impact*[®] (L/I)

"We were successful for a variety of reasons. We kept focused on behavioral commitments, linked culture to organizational realities, didn't assign success to one effort, and always persevered."

Diane Stuart
 Organizational Performance
 Consultant
 Advocate Health Care

The Challenge

To increase and stabilize engagement, a high-profile, semi-autonomous unit of Advocate Health Care chose to focus on organizational culture change, recognizing an opportunity and need to strengthen relationships within the unit as members worked to achieve their strategic goals.

Diane Stuart, an internal Organizational Performance Consultant, worked with the unit's senior leadership team to transform its culture. Using a combination of organizational and leadership assessments, as well as individual and team coaching and retreats, Stuart worked intensively with all 75 members of the unit. Then, she proceeded to use its impressive turnaround to motivate, guide, and transform departments and teams throughout Advocate Health Care.

INCONSISTENT RESULTS

Partly because the unit operates relatively autonomously, with its own leadership team, Executive Director, and President, it developed a subculture in which low employee engagement and several other indicators pointed to its defensive norms and the need for culture change and development:

- Results on the regularly-administered climate survey were inconsistent
- Employees talked about an unhealthy team culture that needed to change and pointed to others as the root cause of the problem

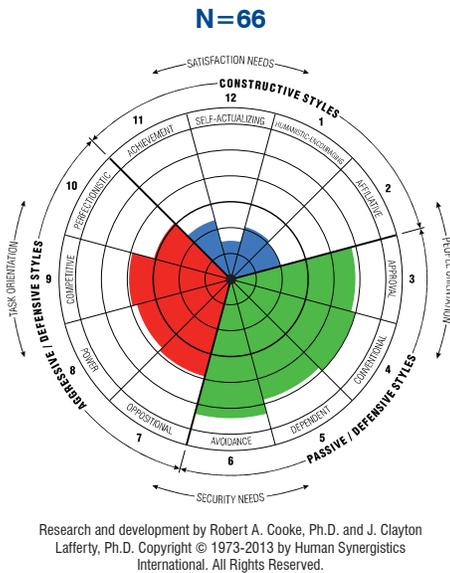
- There were differing and unreconciled perspectives on a variety of issues between unit members at the central office and those at other sites.
- Changes initiated as a result of the climate survey had only short-term effects and no real sustainable impact.

"The climate survey would show low engagement. There would be a flurry of activity which would improve results temporarily, but they would drop back down again," said Stuart. "It was clear they had to work on the behavioral norms that were hindering the development of the strong relationships necessary for effective employee engagement."

"Ineffective working relationships had both passive and aggressive components. In a blaming culture there is little ownership for individual contributions to problems," Stuart added. "Teams that display passive and aggressive behavioral norms don't easily recognize the way those habits and behaviors harm relationships within the team. Behaviors are so ingrained in deflection that members don't see the impact they're having on the group as a whole."

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Figure 1: 2009 Current Culture **MEASURING CULTURE**

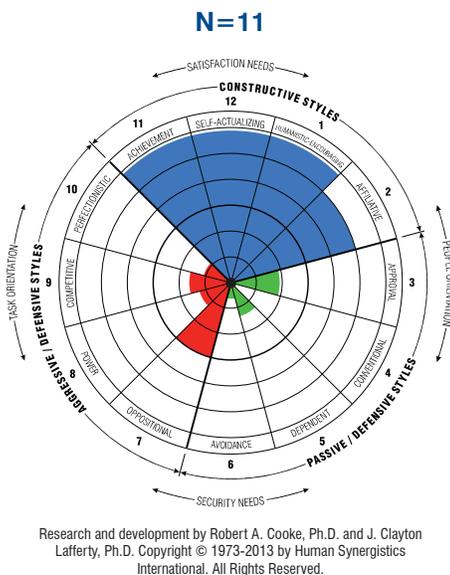


Stuart chose to focus on culture instead of climate and introduced the unit’s 15 senior leadership team members to Human Synergistics’ *Organizational Culture Inventory® (OCI®)*. In 2009, the unit’s 75 employees completed the OCI for the first time, and the OCI-Ideal was completed by the leadership team.

The OCI provides a snapshot of an organization’s current culture, while the OCI-Ideal enables members to quantify the preferred culture and identify gaps and targets for change. (See “About the Circumplex and Culture” on page 6 for a description of the Constructive, Passive/Defensive, and Aggressive/Defensive styles measured by the OCI.)

The OCI appealed to Stuart in part because it is one of several integrated tools in the Human Synergistics suite. “The Circumplex allows participants to interpret and apply style, leadership impact, and culture results in terms of a common model,” she said. “It’s a complex framework, and using it across multiple tools helps leaders and teams ‘see’ results in their own world and apply this knowledge to the change process. As a facilitator, I can spend more time helping leaders and teams make the connections between outcomes and their actions and behaviors.”

Figure 2: Ideal Culture



CULTURE GAPS

The passive and aggressive behaviors observed by Stuart were reflected in the unit’s initial OCI results. The Current Culture profile showed a predominantly Passive/Defensive culture with particularly strong norms for Avoidance behaviors (see Figure 1, at left). In contrast, the more effective Constructive styles were all well below the 50th percentile, with the lowest extension along the Self-Actualizing style.

“A highly passive and aggressive culture was embedded throughout the layers of the unit, from senior leadership to directors

to staff,” said Stuart, so the strong norms and implicit pressure for Avoidance were not surprising. “During meetings, people would change the topic to avoid a potential conflict. Then team members would become frustrated because nothing would get resolved. Sometimes teams want to blame the person who is being aggressive, but you have to help the members change their response to the aggressiveness because that’s as much a part of the culture as the person who is using it to get his or her way.”

While not as strong as the Passive extensions, this aggressiveness showed through in the Current Culture profile as well. All of the Aggressive/Defensive styles were above the 50th percentile, indicating stronger norms and expectations for these behaviors than in the “average” unit, department, or organization.

The unit’s Ideal Culture profile differed dramatically from its Current Culture (see Figure 2, at left). The Ideal profile showed minimal extensions in the Passive/Defensive and Aggressive/Defensive styles, while all the Constructive styles were at or above the 90th percentile. The primary style on the Ideal Culture profile—that is, the one with the highest extension—was Self-Actualizing, the weakest style on the Current Culture profile. One of the weakest styles, Avoidance, on the Ideal profile was the strongest on the Current profile.

CONNECTING CULTURE AND BEHAVIORS

With such a marked disconnect between the Current and Ideal Cultures, the department’s team and Stuart faced a challenging journey, and they had some convincing to do before they could begin.

“The unit’s senior leadership team initially resisted acknowledging the ineffective norms, writing them off as aberrations,” she said. “Staff placed responsibility for changing the culture on the leadership

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Figure 3: L/I Actual Impact

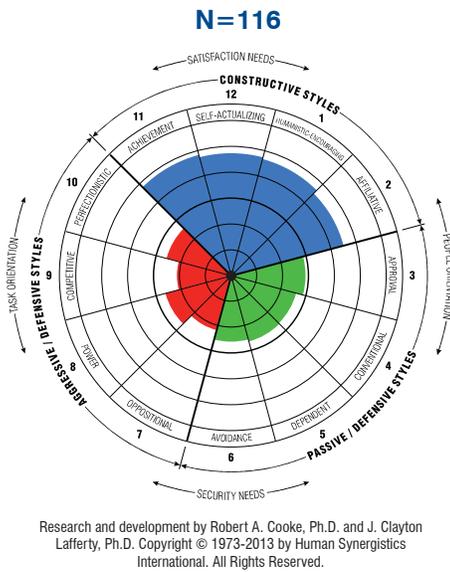
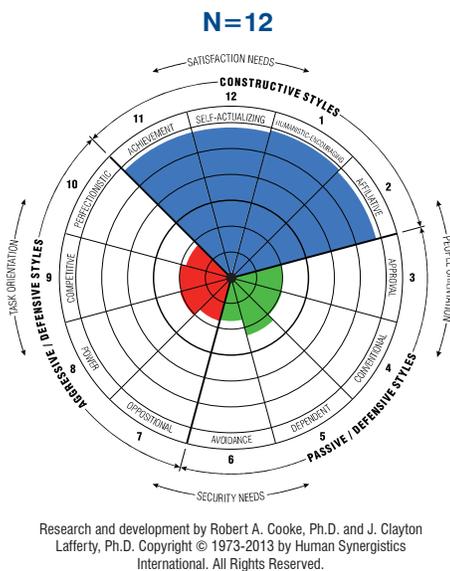


Figure 4: L/I Ideal Impact



team. Helping *both* the leaders and team members see their own behaviors and decide to change the ones that most significantly contributed to an ineffective culture was the key to their success.”

Knowing that she needed buy-in from the top, Stuart began her OCI debriefing at the leadership level. “My initial strategy was to work with senior leadership to help them recognize and identify the culture within their own group.” She continued: “We carried out a number of activities that linked team behaviors to outcomes. The more you can point out the individual and team behaviors, like avoiding a difficult conversation or holding a meeting after the meeting, the more willing people are to change a behavior and take responsibility for the outcome. That’s one of the things I like about the OCI—individuals can specifically identify subtle as well as blatant Passive or Aggressive behaviors and then decide how they will change them.”

Stuart gained a high-level champion for the change process when the unit’s Executive Director was promoted to President. “He was seeing collaborative changes within the senior leadership team and saw people interacting differently than ever before,” she said. “It cemented his resolve to continue the work.”

With a strong supporter at the helm, Stuart was able to bring the OCI initiative to the rest of the unit. “I worked with the staff culture committee, which had a senior leadership team sponsor every month,” she said. “We’d conduct activities to help them identify the staff-level behavior changes that would have the greatest impact on the culture. They chose to work on giving and receiving effective feedback...and promoted education sessions on tools to engage in different conversations. I also worked with the entire team twice a year at their retreats. The senior leadership team led the retreat activities, which sent a strong message about their continuing interest in the culture change process.”

CULTURE AND LEADERSHIP

By 2011, the senior leaders had improved group processes and team behaviors and were ready to explore their individual contributions to the culture. Stuart positioned *Leadership/Impact*® (L/I), a 360° leadership assessment in the Human Synergistics suite, as the next step in the culture change process.

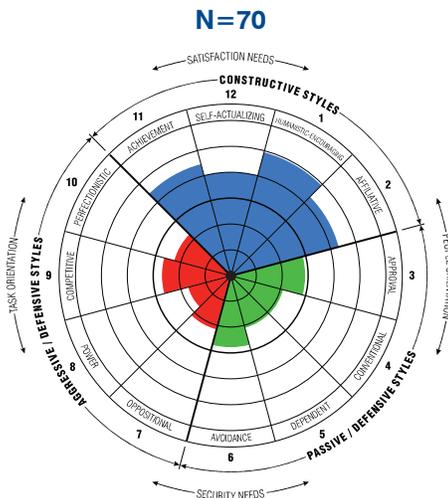
“When I introduced L/I, conversations were different,” she said. “Senior leadership members had strengthened their relationships with each other. They were collaborating more effectively, starting to give each other feedback, and listening more effectively. We talked about how this commitment to individually-focused work would accelerate their culture work.”

The first L/I debrief was carried out using a composite profile combining all of their L/I data. The results reflected what the senior leadership team had learned in their culture work. While there were some gaps between the Actual and Ideal Impact profiles, the Actual Impact profile was nevertheless predominantly Constructive (see Figure 3, at left, which presents combined description-by-others results for the 15 leaders). The primary impact styles were Achievement and Self-Actualizing, both of which were very low on the organization’s original OCI profile. Their Ideal Impact was encouraging as well, showing that the senior leadership team viewed as ideal an even stronger Constructive impact and weaker Defensive impact (see Figure 4, at left).

After nearly two years of immersion in the culture change process, the senior leadership team members deftly applied what they had learned to their personal development and were ready to move on to the next step. “They had made a commitment that the directors reporting to them would receive 360-degree feedback only after they [the senior leadership team] had done enough individual work on their own L/I results

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Figure 5: 2012 Current Culture



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that they could coach their direct reports to an effective action plan,” Stuart said. “Once they had made that commitment, it created its own urgency and pressure. Now we’ve got a group of managers at the next level doing *Management/Impact*[®] (M/I).”

THE CULTURE RETEST

In 2012, the senior leadership team asked to repeat the OCI. They felt that the culture was different and Stuart could see that it had changed on a variety of levels. The retest OCI results showed that this optimism was well-founded, with dramatic changes in the Current Culture profiles from 2009 to 2012.

In contrast with the 2009 profile (*see Figure 1*), on which the Constructive styles fell below the 50th percentile and were the weakest styles overall, the 2012 profile showed the strongest style extensions in the Constructive cluster (*see Figure 5, at left*). In addition, the Defensive styles had all decreased to below the 50th percentile. In a three-year period, the unit effected a significant shift in its culture.

“We were successful for a variety of reasons,” said Stuart. “We kept focused on behavioral commitments, linked culture to organizational realities, didn’t assign success to one effort, and always persevered.”

Stuart is quick to give credit where credit is due. “They did all the work. I was there to help them see their culture, challenge them to think about how it was impacting outcomes, and encourage them to change something about the culture that was getting in their way. They were looking in the mirror and owning what they were doing. They had the courage to have different conversations with each other. People were taking responsibility for their own behaviors and asking others to bring them to their attention. At the beginning of this work, they never would have been comfortable being that vulnerable.”

The senior leadership team took a very active role in the second administration of the OCI, stepping in to debrief the unit’s results. In spite of some nervousness about their ability to debrief the results themselves, Stuart observed that “they had important, collaborative conversations with the staff. It was really fun!”

CONTINUING CHANGE

While the unit achieved impressive changes in its culture in a relatively short period of time, Stuart and the team recognize that there is still room for improvement.

“We’re not done yet—passivity still plays out when team members are required to have difficult conversations or when resolving conflicts, and aggressiveness is still exhibited, especially when members are under stress,” Stuart said. “We’ll keep working on the culture, tying it to what is going on in the climate survey results so it remains top-of-mind as they operationalize change within the organization.”

“Although there’s still work to do, they’re much more aware of when they’re not being Constructive,” she continued. “If they miss an opportunity to have a Constructive conversation, they see it now and wrestle with having the courage to say something about it. That awareness is essential to their success. Relationships are healthier and conversations are more honest. People ask others for their opinions, so being silent in a discussion is not as frequent an option.”

The great gains realized by the unit emphasize the importance of taking ownership of individual contributions to culture, and Stuart credits the Human Synergistics tools with helping the team make the connection. “It’s never one person, and that’s why I love using the OCI and L/I together,” she said. “The OCI gives you a ton of information on what it’s

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like to 'live' in the environment, and the L/I gets people to focus on their contribution to that collective experience. We will absolutely use the OCI again. I think the OCI, L/I, and M/I tools are phenomenal when doing culture transformation work."

In addition to her ongoing work with the unit, Stuart is continuing Advocate's culture change efforts with other divisions. She advises individuals in those units (and in other organizations with culture challenges) to never give up. "Be passionate about the value of culture change to the organization," she advises. "Connect it to business outcomes and help leaders see how much change they can make."

In her work with Advocate, the unit's culture change process gave Stuart another valuable tool: an example of an inspiring shift in culture that can be used to motivate teams struggling with their own initiatives. "I use the unit's Circumplexes as models for other teams I'm working with when they get discouraged. They're great for them because they see that they can really make transformational change happen."

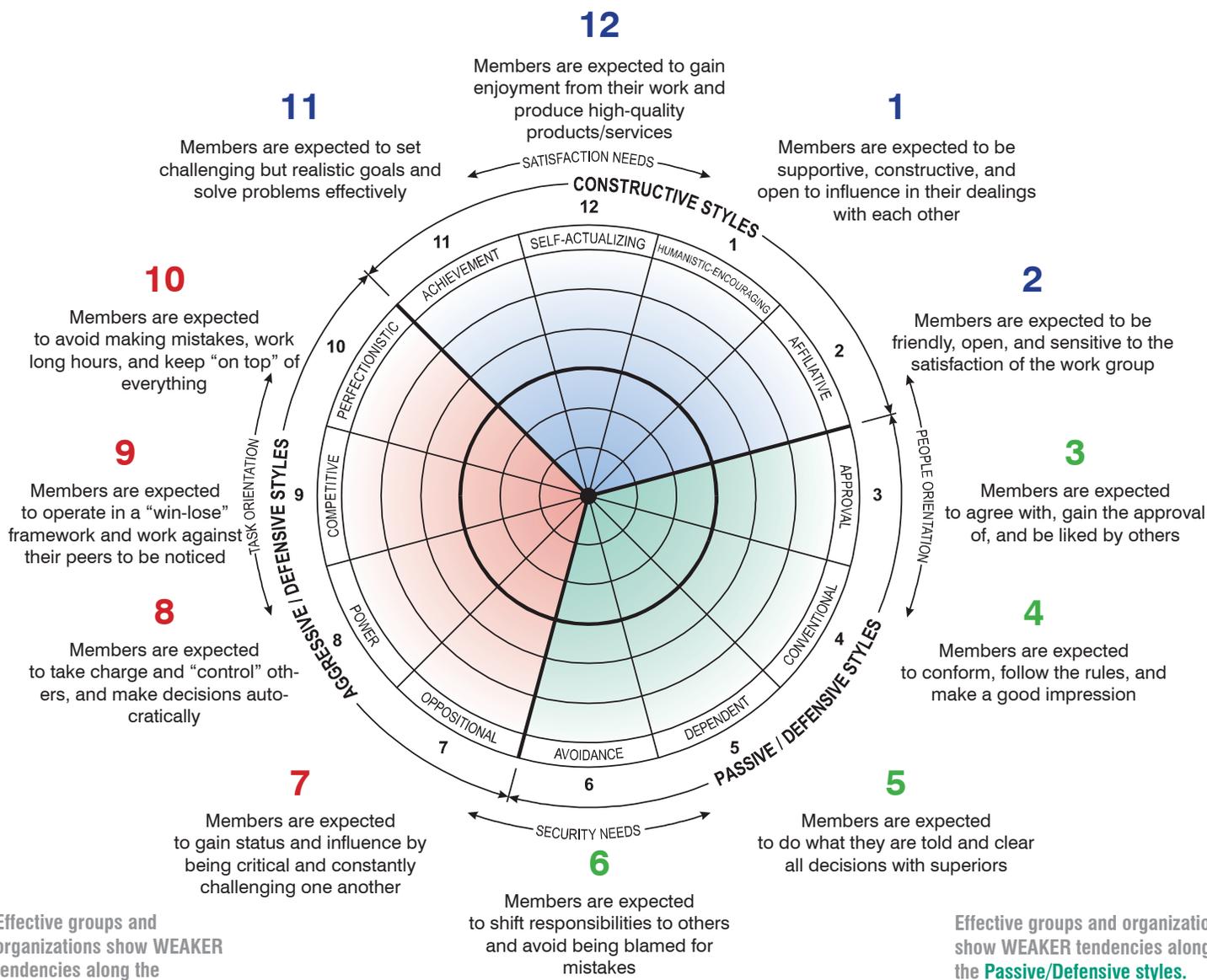
For more information about Advocate Health Care, visit <http://www.advocatehealth.com>.

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About the Circumplex and Culture

Human Synergistics International's Circumplex provides a way to "see" what drives the behavior and performance of individual contributors, leaders, work teams and, in short, the entire organization. It illustrates the factors underlying effectiveness in terms of 12 styles of thinking and behaving. Some styles lead to adaptability and sustainability; some do not. Regardless of their impact, they all describe what's expected, explain what's happening inside the organization, and provide a direction for change and development.

Effective groups and organizations show **STRONGER** tendencies along the **Constructive styles**.



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