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ClimateQUAL

Organizational Climate and Diversity Assessment

ClimateQUAL-Organizational Climate and Diversity Assessment (OCDA) is an assessment of library staff perceptions concerning a) their library's commitment to the principles of diversity, b) organizational policies and procedures, and c) staff attitudes. It is an online survey with questions designed to understand the impact perceptions have on service quality in a library setting. The survey addresses a number of climate issues, such as diversity, teamwork, learning, and fairness, as well as current managerial practices, and staff attitudes and beliefs.

History of OCDA

In 1999, the University of Maryland (UM) Libraries partnered with the UM Industrial and Organizational Psychology (I/OP) program to develop OCDA, an assessment of the climate and culture of the UM libraries. In 2004, the UM Libraries once again partnered with the I/OP program to provide an updated "snapshot." The analyses revealed that a number of positive changes had occurred over the four year interval between the two surveys. This work not only identified the dimensions of climate and culture important for a healthy organization in a library setting, but also provided proof that feedback from the OCDA survey, when taken seriously, can have practical organizational level benefits.

In 2007, ARL and the UM Libraries (in partnership with the I/OP program) tested the generalizability of the OCDA protocol across multiple library organizations. During Phase I, five ARL institutions tested a modified OCDA survey and validated the hypothesis that a healthy organization provides

better customer service. In 2008, during Phase II, ten ARL and non-ARL institutions expanded the pilot, further refining the protocol. In 2009 the protocol was transferred to ARL in partnership with the I/OP program, known as ClimateQUAL: OCDA.

The National Project

Building a Healthy Organization Theory

The framework for the development of the ClimateQUAL-OCDA is found in the organizational climate research literature. Three concepts intersect to create the climate of an organization: climate, culture, and diversity. Understanding these three concepts and how one impacts another is critical for creating an agile organization poised to survive in a rapidly changing environment.

The work to date on this national project indicates that the combination of workforce diversity, organizational climate, and organizational culture can lead to a "healthy organization" with the following elements:

- **Organizational Climate**—"describes *how* things are done in an organization. It is the employees' shared perceptions of the themes, goals, or imperatives that describe their workplace."¹ This understanding generally comes from the policies, practices, and procedures that an organization has in place.

- **Organizational Culture**—"refers to *why* things are done. It is the shared mean-

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ing that employees use to make sense of what happens in an organization. Employees may refer to organizational values to explain why certain policies or procedures are implemented.”²

- **Workforce Diversity**—as the ethnic diversity of the workforce continues to increase, this provides organizations the “opportunity to hire employees with a diverse set of competencies, perspectives, and problem-solving skills.” As such, this increased diversity enhances an organization’s ability to be “more responsive to a dynamic and ever changing environment.”³

Paul J. Hanges goes on to define the *Healthy Organization* as “an organization in which employees feel empowered. It is one in which employees believe that management values them and treats them fairly. It is an organization in which the policies, practices, and procedures are administered consistently and these practices work in concert to facilitate the attainment of one or more organizational goals (e.g., productivity, efficiency, safety).

Finally, it is an organization in which the connection with its environment is not forgotten.”⁴ They further state that the “healthy organization sends two kinds of complimentary messages to their employees (i.e., concern for employees and concern for customers). The ‘concern for employees’ message is sent when organizational practices, policies, and procedures strongly indicate that things like teamwork, diversity, and justice are valued. The ‘concern for customers’ message is created when the organizational practices, policies, and procedures strongly indicate that customers are valued and meeting their needs is essential. When both of these messages are communicated, forces pushing toward overly restrictive workforce homogeneity are mitigated.”⁵

The ClimateQUAL-OCDA national project is researching the “role that organizational climate and organizational culture play in effectively managing workforce diversity”⁶ to create a healthy organization.

ClimateQUAL-OCDA Instrument

The ClimateQUAL-OCDA is an instrument that draws on staff perceptions of the themes and goals that describe their place of work in a very broad and deep way. As a data gathering tool, it assesses whether the policies, procedures, and practices of the library are effectively supporting its mission. It also examines aspects of the library’s climate, e.g., fairness, diversity, and teamwork as they relate to customer service. Lastly, this tool examines employees’ perceptions of what behaviors are rewarded, supported, and expected in the organization. For a complete list of the concepts, go to the ClimateQUAL-OCDA Web site.⁷

Project goals and phases

The goals of the project are to:

- develop a tool that assesses the “health” of the library;
- develop a large database of norms to help libraries interpret their results;
- develop an active community of libraries that share experiences and strategies to improve the effectiveness of their libraries;
- track changes in libraries over time to permit objective feedback regarding effectiveness of the attempted practices and strategies; and
- build empirical validation of the “healthy organization” theory.

Participating institutions have agreed to continue to use the ClimateQUAL-OCDA survey at regular intervals, generally every three to four years. This is important in order to build benchmarks from which to gauge improvement over time.

Phase I

In 2007, five institutions participated as part of the Phase I activities including: University of Arizona, University of Connecticut, University of Iowa, University of Kansas, and Texas A&M University. The purpose of the survey was extended to capture information about LGBT (Lesbian, Gay, Bisexual and Transgender) issues and the concept of climate for service, which had not been pre-

viously tested in earlier implementations at UM. It was also agreed to test the Schneider Model—that organizational climate affects service to customers positively or negatively—a theory developed by Benjamin Schneider at UM. With the addition of questions related to LGBT issues and climate for service, the survey instrument stayed relatively the same as the 2004 survey completed by the UM Libraries staff.

Goals for Phase I of the project were to test the existing instrument to see if the questions being asked translated to other institutions, assess the viability of an online survey using SurveyMonkey, and test whether there is a correlation between the climate of an organization and customer perceptions about the service they receive. The five partners supported this effort fiscally as well as by permitting the use of their LibQUAL+ data in the research. Administration of the survey at each site was staggered from April to July with the survey open to staff for approximately three weeks. The overall return rates for the five sites ranged from 66.29% to 85.77%. Phase I partners received their reports October 2007, reviewed the results with their staff, and are now addressing issues raised in the results. To support the project, a variety of tools were created during Phase I to provide information to the participating libraries and placed on the ClimateQUAL-OCDA Web site.

Phase II

Phase II of the project began January 2008 with ten institutions including the UM Libraries, Arizona State University, Cornell University, Duke University, Emory University, Kansas State University, New York University, Northwestern University, University of Houston, and University of Massachusetts-Amherst. The goals were to continue testing the instrument and retain the questions that provide useful data (survey was reduced by approximately 100 questions after Phase I), test the reporting mechanisms, and build on what is being learned from Phase I institutions and their development of change strategies. Phase II survey implementation

was again staggered over a four-month period. The overall return rates for the ten sites ranged from 45% to 81%.

Project findings/connections to LibQUAL+ and customer service

Analysis of the Phase I results indicated that the concepts and scales in the original UM Libraries instrument “exhibit the same psychometric properties when administered at non-UM libraries”⁸ confirming the “generalizability and robustness of the OCDA scales.”⁹

Hanges developed survey questions to test the internal climate for service and the nature of the relationship of this climate measure to other dimensions of the survey, such as climate for teamwork, diversity and workgroup conflict, as well as the relationship of these concepts to the LibQUAL+ dimensions of Affect of Service, Information Control, and Library as Place. Data regarding the relation between climate for diversity and climate for teamwork with the LibQUAL+ scores show that valuing diversity and information facilitation of teamwork relate to measures of customer service.¹⁰

Such findings support the hypothesis that an optimal level of diversity relates to climate for service and defines the concept of a healthy organization, which is “better able to fulfill its service mission.”¹¹ Phase I results also indicated that conflict within an organization does impact customer perceptions of library service quality, meaning that the climate of the organization does have a “direct and perceived impact on the service experienced by customers.”¹² The relationship between a healthy organization and its ability to fulfill its service mission will be further researched using LibQUAL+ data from Phase II partners.

Getting involved in Phase III and beyond

One of the critical components of ClimateQUAL-OCDA is the development of a community of interest and practice. In the case of this project, it is important to establish

the ability for participating institutions to share their ideas about transformative changes. Sharing expertise on how to implement change efforts relieves some of the burden for any one organization. Not reinventing the wheel is also important in this day of quickly changing environments and ever tightening budgets. Partners engaged in Phases I and II are committed to sharing their expertise within the community.

Phase III of the project is underway in 2009 with another small group of institutions. Participation will add to the research foundation already established. Further testing of the instrument and the reporting mechanisms are critical elements for building a sustainable tool. If a library is interested in participating in 2009 and beyond or would like to learn more about the project, contact climatequal@arl.org.

We are close to our goal of having yet another valuable assessment tool offered to the library community by the ARL Statistics and Measurement Program: ClimateQUAL-OCDA.

Notes

1. Paul J. Hanges, Juliet Aiken, and Xiafang Chen. "Diversity, Organizational Climate, and Organizational Culture: The Role They Play in Influencing Organizational Effectiveness" in *Proceedings of the Library Assessment Conference: Building Effective, Sustainable, Practical Assessment, September 25-27, 2006, Charlottesville, VA*, ed. Francine DeFranco et al. (Washington, D.C.: Association of Research Libraries, 2007), 359.

2. Ibid., 360.

3. Ibid., 359–60.

4. Paul J. Hanges, Juliet P. Aiken, and Xiafang Chen. "Climate for Diversity and Customer Service: The Healthy Organization" Paper accepted for presentation at the 2008 American Psychological Association Conference, Boston, p. 5, www.lib.umd.edu/ocda/hanges_libraryapa.pdf (Accessed February 2009).

5. Ibid., 5.

6. Hanges et al., (2007) 359.

7. University of Maryland Libraries, "ClimateQUAL™-Organizational Climate and Diversity Assessment," www.lib.umd.edu/OCDA/ (accessed February 2009).

8. Paul J. Hanges, Juliet Aiken, Xiafang Chen, Hali Chambers. "Phase 1 OCDA Scale Results: Psychometric Assessment and Descriptive Statistics for Partner Libraries." Phase 1 OCDA Project, Technical Report, Industrial and Organizational Psychology Program, Department of Psychology, University of Maryland. (2007): 3.

9. Ibid., 2.

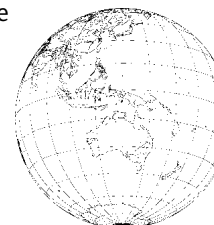
10. Hanges et al., (2008).

11. Charles B. Lowry and Paul J. Hanges. "What is the Healthy Organization? Organizational Climate and Diversity Assessment: A Research Partnership" *portal: Libraries and the Academy*, vol. 8, no. 1 (2008): 3–4.

12. Ibid., 4. ~~22~~



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