



BETTER STRATEGIES.
BETTER LEADERS.
BETTER ORGANIZATIONS.

Culture, Morale, and Motivation in Organizations: An Overview

ORGANIZATIONAL PERFORMANCE GROUP

15 Research Drive, Woodbridge, CT 06526

PHONE (203) 288-6688

FAX (203) 745-3190

EMAIL info@orgpg.com

www.organizationalperformancegroup.com

Organizational culture is... “the shared meanings, beliefs, and understandings held by a particular group or organization about its problems, practices, and goals.”ⁱ

Introduction

Proactive and engaged leaders of organizations, large and small, are interested in how their organizations can do better. The definition of “better” might vary from one organization to another, but those achievements universally rely on the high performance of human beings engaged in the organization’s life. The culture and climate in which those people operate, and which they and the organizational system create daily, dramatically impact the organization’s ability to do its best. Morale is one result of an organization’s culture and climate. Dynamic, healthy, and appropriate cultures and climates lift morale which in turn increases effectiveness, in turn creating an even healthier culture and climate. Difficult and dysfunctional cultures and climates work in the opposite direction, dragging down results and diminishing morale.

Because morale is so dependent on organizational culture and climate, researching morale in the organization strongly implies conducting research on culture and climate as well. Culture, climate, and morale (CCM) research is intricately intertwined.

Purpose and Context of Overview

It is intended to give the reader preliminary ideas about what it takes to conduct organizational CCM research and to consider what a full training or project might entail. The author of this document, Laura Freebairn-Smith, MBA, PhD, is a Partner in the consulting firm, Organizational Performance Group (OPG). She has extensive experience in measuring CCM in organizations and in change management. Her full biography and contact information is at the end of this overview.

Objectives of Culture, Climate, and Morale Research

“After all, when morale is high, the employees tend to have more energy and greater focus on achieving the organization’s goals. Conversely, when morale is low, employees seem to have less energy and spend more of their time complaining, looking for other jobs and/or simply trying to protect themselves. In short, when morale suffers, performance suffers because employees devote far less time towards delivering results.”ⁱⁱ

Signs of low morale can be inferred from the quote above: high turnover, low productivity, excessive absences, et al. CCM research in organizations is usually undertaken so that change can be implemented when other attempts to remediate issues have not been successful. Typical drivers for undertaking CCM research include the need to:

- Remove barriers to productivity
- Decrease turnover
- Restructure the organization to increase productivity and satisfaction
- Create succession plans
- Improve compensation and benefit packages
- Decrease lawsuits and other forms of organizational risk
- Determine the type of leadership needed for the organization’s future
- Decrease stress
- Create work/life programs
- And more...

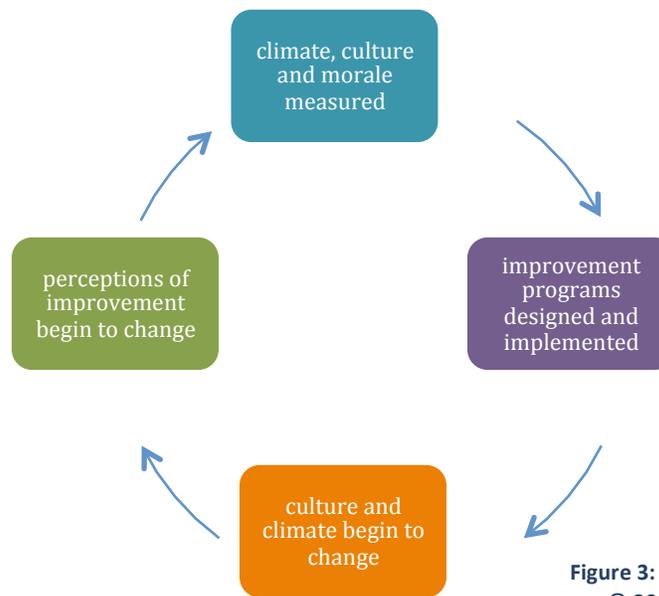


Figure 3: Culture, climate, morale, and motivation;
© 2015 Organizational Performance Group
Please use with attribution

The CCM research itself has its own objectives:

- Establish baseline measures for staff engagement and inclusion across the organization
- Obtain an analysis of data, including perceptions
- Provide secure, online data access for additional, ad hoc analysis capabilities by organizational unit
- Provide benchmark information comparing data to peer institutions

There are thousands of CCM research instruments in the public domain and these instruments often focus on a few key areas of organizational climate and culture:

- Leadership
- Work-life balance
- Stress levels
- Management
- Resource allocation
- Support functions
- Communication
- Job satisfaction
- Organizational commitment

“Two of the most commonly assessed dimensions of work attitudes are job satisfaction and organizational commitment.ⁱⁱⁱ Job satisfaction is an employee’s internalized appraisal of one’s job, job experiences, or job situation.^{iv} Organizational commitment is the extent to which an employee is committed to his or her organization.”^{vi}

Figure 1 presents the results of a typical “morale” study; this one polled human resource managers in the United States. A careful look at the survey items indicates that the study looked more at motivation and climate than morale, but they are two factors that influence morale. An organization could use these results to design improvement programs.

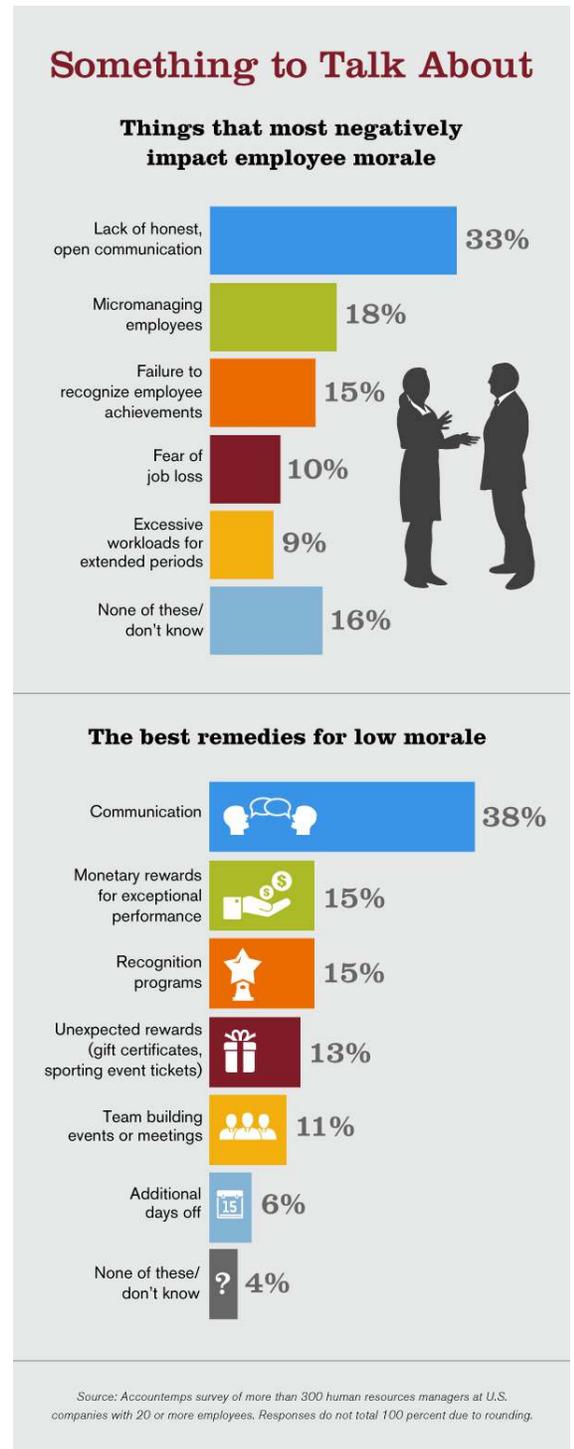


Figure 2: Sample results from a morale survey

Morale, Climate, and Culture

Climate, culture, and morale are linked together.

Three key concepts, and their relationship to one another, are critical for undertaking CCM research—climate, culture and morale. A fourth term is often used interchangeably with morale—“motivation”—although morale and motivation are not synonymous. Definitions of each term follow, along with Figure 3, below:

Climate: the collective affective reaction to an organization’s culture and environment

Culture: the shared behavioral norms and mental models about how an organization and its constituents should and do behave

Motivation: the internal process that initiates, guides, and maintains goal-oriented behaviors; motivation can be impacted by both external and internal drivers

Morale: the collective reaction and affect related to the climate and culture

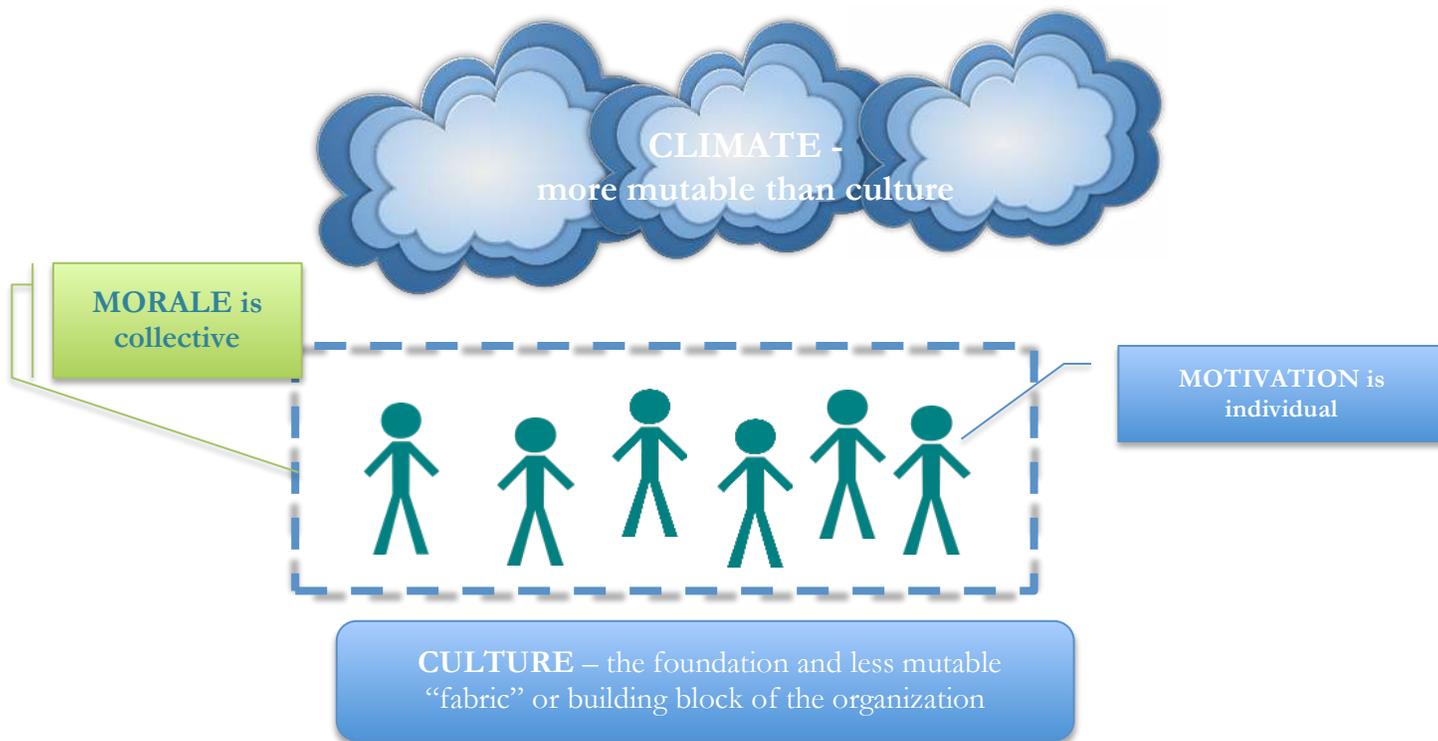


Figure 3: Culture, climate, morale, and motivation;
© 2015 Organizational Performance Group
Please use with attribution

Climate and Culture are two different concepts.

Climate is different from culture. Two different organizations can have the same culture, but very different climates. For example, both can have high-risk tolerant, entrepreneurial cultures but one can have a negative climate while the other has a positive climate. Culture influences climate to a significant extent.

“Organizational climate includes employee perceptions of and affective response to the workplace and work tasks”^{vii} while culture “...is defined as the organizational norms and expectations regarding how people behave and how things are done in an organization”^{viii} and includes implicit norms, values, shared behavioral expectations, and assumptions that guide the behaviors of members of a work unit.”^{ix}

Another metaphor that helps distinguish climate from culture is that of a house: think of culture has the fundamental design of a house – is it modern, colonial, Spanish, etc.? That is the culture. The climate of the house is the interior design, the relationships of the people in the house, etc. The former (culture/design) is hard to change; the latter (climate/interior and relationships) is easier to change.

Morale and motivation are related but not the same.

It is also important to differentiate morale and motivation: morale is collective, motivation is individual. The concept of morale is heavily used in domains in which collective effort and energy are essential for accomplishing extraordinary goals or delivering critical services.

Morale is one result of an organization’s culture and climate; a dynamic, healthy, and ‘appropriate to the work’ culture lifts morale which in turn increases effectiveness, in turn creating an even healthier culture. A difficult and dysfunctional culture works in the opposite direction, dragging down results and diminishing morale. Morale, unlike motivation, is not easy to change because it is about the collective esprit de corps, not a single individual, and yet morale is the sum of the individuals’ experience in an organization.

Fundamental Steps in Researching Culture, Climate, and Morale in Organizations

In this section, the fundamental steps of a CCM research project are outlined. An organization needs to customize each step to fit its characteristics, constraints, and goals.

Steps in a CCM Research Project

Determining readiness

- Determine if a CCM research and improvement project is merited
- Determine if the timing is right to conduct the research

Designing the project

- Conduct project design, entry, and contracting activities
 - Meet with the leadership to ensure that the project structure will work for the organization and that there is buy-in to the full process.
 - Meet with the leadership team to review the project, their role, their vision, and other success factors.
 - Design full communication plan; note that communication continues throughout the process.
- Begin outreach to all constituents and participants

Collecting data

- Determine appropriate data collection tools and the sequence of use; data from one tool can inform the design of another.
 - Interviews
 - Focus groups
 - Surveys
 - Document review, e.g.
 - Human resource data
 - Financial data
 - Safety violations
 - Production line data
 - Public domain commentaries
 - Observations

- Benchmarking studies
- Design data collection tools (or customize existing ones) and determine populations and sampling techniques. See following section on “The Survey Process.”
- Implement data collection; each data collection tool has a distinct protocol for implementation.
- Analyze the data; determine best analysis methods, e.g. factor analysis, correlations, regression analysis, content analysis, etc.

Sharing findings

- Share the findings in a series of cascaded meetings, with editing done between cascades.
- Share findings in a variety of venues and settings, and through different modalities (written documents, videos, presentations, etc.).

Creating solutions

- Create venues for co-developing solutions and programs to improve the culture/morale. OPG recommends separating the activities of “results sharing” from “creating solutions.”
- Select solutions that are viable and will have meaningful impact. Link solutions and programs to organizational success measures.
- Create organizational teams and infrastructure to support roll out of programs; get organizational buy-in to the solutions and programs.
- Roll out the solutions and programs.

Checking progress

- Conduct random sampling throughout the next two years, on a quarterly basis, to determine if programs are having an impact.
- Increase communication and outreach efforts.
- Re-measure culture/morale in two years, three years at the latest, but not within one year. The time interval between surveys and measurement is important; it has to match the pace at which the item measured can change and how long it takes people to perceive the change. The lag time between improvements and perceived change in CCM is slow. The iterative cycle of CCM change is shown in Figure 1 on page 3.

In large organizations, a simple step such as sharing the findings of a morale study can require significant time and effort with hundreds of meetings and group sessions. Size and scope have

a significant impact on research design and project duration. To conduct research in a large organization, a significant research team must be assembled, and outreach and inclusion have to be adjusted for different “local cultures” within the organization. Designing such research is a complex, time-consuming process and requires significant funding.

The Survey Process

For a large organization, a successful CCM survey would entail many steps, which are sketched out below. (Recall that the survey is only one step in the overall CCM research process, as described above.)

1. Determine the goals and objectives of the survey process.
2. Develop a robust project plan and timeline. Organizational improvement projects are ongoing and CCM research is one step or part of those efforts. This is an important psychological aspect of CCM research – it’s a beginning or part of an ongoing process, not an end in and of itself. The timeline might be as long as one year for the first run of a survey.
3. Develop a survey based upon these goals. Survey design should involve leadership and can involve other constituents. Surveys are often designed based on results of interviews and focus groups.

One critical question, which changes the scope of the project, is whether the organization wants to use an existing survey, create a new survey, or blend new and existing surveys. One reason to use an existing survey is to be able to benchmark the results against other organizations’ results.

4. Conduct orientations to explain the purpose and importance of the process. Confidentiality measures must be explained and survey respondents must be told what will happen with the final report and who will receive the results. The survey is conducted online and is left open for a period of time that matches the schedules of the organization.
5. The reporting phase of the process is critical to action planning. The report often reflects data parsed to match the organization’s structure. It can also be divided by key demographics. Any reporting about a subset of the organization is contingent on having enough respondents to protect confidentiality.

6. Results are rolled out in a careful sequence of meetings to support the leadership and management effectiveness. Multiple meetings are held with top leaders to ensure the report reflects the language of the organization and will support growth.
7. After the leadership sees the results, the results are then shared throughout the organization in a variety of settings and using different communication methods.
8. After the data is shared, meetings are held with managers and their teams to make plans for improvement.
9. If merited, the organization might create a special unit to oversee and integrate the improvement activities
10. Ongoing communication is key; “All actions based upon the results need to be publicized. People need to know that they spent their valuable time filling out a survey and they were heard. If employees do not feel that the survey changed things for the better, at best, they will not want to complete future surveys and at worst, they will become even more actively disengaged.”^x

Common Mistakes to Avoid in Surveys

Kristine Hafner, who works with the University of California system, summarizes the “seven survey sins” which the above process helps avoid:

- Bad timing
- Surveying the entire organization instead of a representative sample
- Surveying too frequently
- Oversimplified surveys
- Sample is too small
- Results tied to performance bonuses
- Arbitrary target numbers are set^{xi}

Ethical and Professional Guidelines for Conducting Organizational Research

There are different guidelines for conducting research with human subjects in different settings. For academic research, the ethical standards, procedures, and protocols are significant and inviolable. For example, research that uses human subjects must be approved by the institution’s Institutional

Review Board (IRB) and Human Subjects Committee (HSC). Academic research results that have not abided by these guidelines are considered not only null and void, but can also put the researcher at risk of institutional and legal action.

Conducting research within organizations, for non-academic purposes, must meet a less stringent standard but must meet ethical and professional standards nonetheless. The Council of American Survey Research Organizations' (CASRO) ethics policy, while focused on marketing research, has a close parallel to organizational morale/climate research standards.

1. Research organizations shall ensure that participation in research is voluntary and based on informed consent.
2. Research organizations shall respect the rights and well-being of individuals who participate in research, and shall make all reasonable efforts to ensure that individuals are not harmed or disadvantaged as a result of their participation in research.
3. Research organizations shall make all reasonable efforts to protect the privacy of research participants and to keep personal information confidential and secure.
4. Research organizations shall be honest, transparent, and straightforward in their professional and business relationships.
5. Research organizations shall conduct research based on a consistent commitment to integrity, objectivity, and quality.
6. Research organizations shall exercise independent and professional judgment in the design, conduct, documenting, and reporting of their research projects and activities.
7. Research organizations shall ensure that research is conducted by persons with appropriate training, qualifications, and experience.
8. Research organizations shall comply with all applicable national and international laws and regulations.^{xii}

These standards have implications for the design and implementation of a CCM research project. For example, participation in surveys must be voluntary and confidential. Managers should not ask staff if they have completed a survey. CEOs and organizational leaders cannot ask the researchers for reports on whether an individual has participated or not. Findings must be shared with participants.

Possible Next Steps to Research Culture, Climate, and Morale in an Organization

In most private and nonprofit sector organizations, a CCM research project is not undertaken unless leadership is fully engaged and initiates the project. Without full leadership support, the effort and funds to do the research can be wasted on blocked communication, lack of follow through, and more. The following steps should be considered to provide the OIG information about strengthening the likelihood of success in its morale assessment efforts:

- Engage leadership in a dialogue about their goals, hopes, and concerns about CCM research; prepare leadership for the pros and cons of conducting such research. Convene a group of stakeholders to form a committee to guide in the survey process.
- Prepare a full training and roll out manual for morale and culture research and improvement.
- Hold several sessions with key leaders and possible project leaders to create a project plan with deliverables, timing, a communication plan, and more.
- Recruit and engage outside experts for some parts of the CCM research; this will ensure neutrality and confidentiality.
- Put project plan into motion.

Conclusion

Although complex, CCM research projects in organizations are now a standard practice. Best practices, guidelines, ethical considerations, and all aspects of such projects are readily available to guide an organization as it undertakes this type of research. More importantly, CCM research allows an organization to take a close look at its cultural and climate strengths and areas in need of improvement in a way that transcends “managing by anecdote.”

o:\reference materials\culture\lfs essay on org culture, morale, and motivation.docx

Author's Biography

Laura Freebairn-Smith, Partner, has been a consultant for such distinguished companies as the New York Times and ESPN. Her specialty is assisting leaders in realizing the full potential of their organizations through humanistic and analytical practices, while offering guidance in the redesign of infrastructure, the creation of strategic plans, and with organizational development.

Laura currently teaches leadership at Yale's Drama School and the Office of International Affairs. Prior to that, she served as Director of Yale's Organizational Development and Learning Center, which she helped create.

Her work and career have three major foci:



- Consulting on organizational development issues with a special emphasis on strategic planning, analytics, and organizational redesign
- Leading the creation of organizational cultures
- Teaching and research on organizational development topics

Laura's credentials include a BA from UC Berkeley (Philosophy and Political Science) and an MBA from the Yale School of Management. She holds a doctorate in Organizational Systems from Saybrook Institute and has published articles and chapters on organizational development topics, most recently on the issue of stereotyping in the workplace.

Prior to joining Yale, Laura founded Good Work Associates, a consulting firm providing strategic planning and organizational development. Before that, she served as Managing Director for the Gesell Institute of Human Development, as Chief Operating Officer for Jobs for the Future, and as Education Coordinator for the International Rescue Committee on the Thai/Cambodian border.

In addition to her tenure at Yale, Laura has taught at the University of New Haven, Georgetown University, and Central Connecticut State University. She recently served on the Town of Hamden Charter Revision Committee and has served on numerous other boards in the past. Laura has received several leadership awards. For recreation, Laura enjoys running, writing poetry, and gardening.

Contact Information

Laura Freebairn-Smith
Principal
Organizational Performance Group
15 Research Drive, Suite 4
Woodbridge, CT 06525
203-288-6688 (office)
203-553-9620 (fax)
203-494-7049 (cell and text)
lfreebairnsmith@orgpg.com
www.organizationalperformancegroup.com

Endnotes

- ⁱ Numerous authors and citations; specifically cited in Kropp, Richard, *Developing Human and Organizational Excellence*, 2003. Advanced Management Services, Inc.
- ⁱⁱ <https://www.td.org/Publications/Blogs/Human-Capital-Blog/2012/04/Improving-Organizational-Morale>
- ⁱⁱⁱ Glisson & Durick, 1988
- ^{iv} Locke, 1990
- ^v Lease, SH. Annual review, 1993–1997: Work attitudes and outcomes. *Journal of Vocational Behavior*. 1998;53(2):154–183.
- ^{vi} *Adm Policy Ment Health*. Author manuscript; available in PMC 2006; Sep 12.; Published in final edited form as: *Adm Policy Ment Health*. 2006 May; 33(3): 289–301. doi: 10.1007/s10488-006-0039-1; PMID: PMC1564125; NIHMSID: NIHMS10918; Organizational Climate Partially Mediates the Effect of Culture on Work Attitudes and Staff Turnover in Mental Health Services; Gregory A. Aarons and Angelina C. Sawitzky
- ^{vii} *Adm Policy Ment Health*. 2006 May; 33(3): 289–301. doi: 10.1007/s10488-006-0039-1; PMID: PMC1564125; NIHMSID: NIHMS10918; Organizational Climate Partially Mediates the Effect of Culture on Work Attitudes and Staff Turnover in Mental Health Services; Gregory A. Aarons and Angelina C. Sawitzky
- ^{viii} Glisson C, James LR. The cross-level effects of culture and climate in human service teams. *Journal of Organizational Behavior*. 2002;23:767–794.; Verbeke W, Volgering M, Hessels M. Exploring the conceptual expansion within the field of organizational behaviour: Organizational climate and organizational culture. *Journal of Management Studies*. 1998;35(3):303–330.
- ^{ix} Cooke, R.A., Rousseau, D.M.; Behavioral norms and expectations: A quantitative approach to the assessment of organizational culture. *Group & Organization Studies*. 1988;13(3):245–273.
- ^x Adapted from <http://teambuildersplus.com/articles/organizational-climate-surveys>
- ^{xi xi} <http://provost.wisc.edu/deptChairs/images/ImprovingClimate.pdf>
- ^{xii} <http://www.casro.org/?page=TheCASROCode2014>; Council of American Survey Research Organizations