

## Conducting a Workplace Assessment: Leader and Employee Engagement

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### Overview

The [State Facilities Workplace Strategies and Space Use Guidelines](#) outline a business process for defining the modern work environment for state organizations. The modern work environment process may be different from the traditional way some state agencies planned and designed space. This approach outlined below emphasizes employee engagement to support employees in doing their best work. The goals of this process are to 1) gain a better understanding of how and where employees conduct their best work and 2) what is needed in the workplace to support that work.

A successful workplace transformation process engages the employees from the beginning of a project through completion. Employees need to understand “what’s in it for me?”, the “why?”, the “how?”, and the “when?”. A [change management plan](#) is recommended.

After completing an [employee work pattern assessment survey](#) and evaluating the results, conduct on-site observation to see how the space is actually used. Then interview department leaders and conduct employee focus groups. This allows for the current state of the organization to be further defined and for potential future states to be explored. The goal is to identify how the workplace can better align with users’ work patterns and represent the desired state and leadership’s vision. The workplace assessment is complete when the work pattern assessment survey is combined with on-site observation and interview,

### Leader interviews

Conduct interviews with leaders of the business units to understand the strategic vision for the various groups and their connection to the broader organizational mission. Work to understand their customers, specific departmental challenges, and ideas for better work processes. Confirm work patterns and values and define the desired future state.

### How to prepare

- Prior to the interviews:
  - Identify an executive sponsor who can be an additional voice in the conversations and provide guidance on how much pre-education will be required for leaders.
  - If needed, coordinate with OFM to educate leaders on the bigger picture concepts of building a modern work environment and/or set up tours of implemented projects.
  - Use the topics in the chart below, work pattern assessment survey results, and on-site observations to perform a gaps analysis (difference between the current state and future state defined in the work pattern assessment survey results).
- Prepare five to seven interview questions based on the topics below and the gap analysis.
- Pick a moderator who is comfortable with lively discussion, can create an atmosphere of trust and openness, and encourage participation while managing the conversation.
- Assign an observer to take detailed notes including body language and degree of engagement.

### How to conduct

Kick-off leader interviews with a short modern work environment presentation that includes the “why”, the goals of the leadership interviews, and expectations of the participants. Use the set of questions you drafted prior to the session to guide the conversation. When you’re done, analyze the results to find themes, surprises, and ideas that stand out. Use the results to inform your engagement with employees and identify any potential gaps between the leadership and employee visions for a work environment and how their best work is conducted.

### Leader interview topics

Vision	Overall Organization	Business Process
<ul style="list-style-type: none"> <li>- Values</li> <li>- Strategic goals</li> <li>- Challenges and opportunities</li> <li>- Key performance indicators</li> <li>- Business impacts</li> </ul>	<ul style="list-style-type: none"> <li>- Overview</li> <li>- Organizational chart</li> <li>- Staff numbers</li> </ul>	<ul style="list-style-type: none"> <li>- Location(s)</li> <li>- Workflow/ adjacency</li> <li>- Perceived or measured productivity</li> <li>- Critical handoffs</li> <li>- Current mobility &amp; flexible work options</li> <li>- Current technology</li> </ul>
Human-element	Customer	Workplace
<ul style="list-style-type: none"> <li>- Demographics</li> <li>- Culture (existing and desired)</li> <li>- Attraction &amp; retention</li> <li>- Employee satisfaction</li> <li>- Learning &amp; training</li> <li>- Work styles</li> <li>- Employee experience</li> </ul>	<ul style="list-style-type: none"> <li>- Visitors</li> <li>- Security</li> <li>- Customer experience</li> </ul>	<ul style="list-style-type: none"> <li>- Current work environment</li> <li>- Ideal work environment</li> <li>- Behaviors and physical components</li> </ul>

### Employee focus groups

Conduct employee focus groups to better understand the complexities of the work being performed, collect ideas related to future needs, and draw out people’s perceptions about the change. Employee focus groups should engage a cross-section of the organization and encourage feedback and sharing of ideas through an open discussion.

### How to prepare

- Invite Human Resources and Information Technology experts as Employee Focus Group members.
- For small programs, plan for 100 % participation. For larger programs, identify engage a cross section of employees that represent the larger organization impacted by the change.

- Pick a moderator who is comfortable with lively discussion, can create an atmosphere of trust and openness and encourage participation while managing the conversation.
- Assign an observer who will take detailed notes, including body language and degree of engagement.
- Choose a setting that people will be comfortable sharing feedback, opinions, and ideas.
- Use information gained from leadership interviews to structure your session and articulate the leadership’s vision to the employees.
- Prepare seven to ten questions broad enough to encourage discussion. Use the topics in the chart below, the work pattern results, and [Guidelines](#) to help you define them.
- Prepare interactive exercises for maximum engagement (see examples below).

### How to conduct

Kick-off the focus groups with a short modern work environment presentation that includes “what’s in it for me”, “why”, the “when”, the objective of the focus group and expectations of the participants. Use the set of questions you drafted prior to the session as the conversation guide. Rather than just talking, use interactive exercises to pull out ideas. You can select images to represent an ideal work environment, choose words from a pre-defined set to define current and future state, or list physical, technological, and behavioral attributes to “keep”, “toss”, or “create”. After completing the session, analyze the results to find themes, surprises, and ideas that stand out and use them to inform your space programming and planning.

### Employee focus group topics

Group Adjacencies and Functional Needs	Culture	Scenario Planning
<ul style="list-style-type: none"> <li>- Work patterns</li> <li>- Opportunities to share functions or functional support spaces</li> <li>- Customer interface</li> <li>- Technology requirements</li> <li>- Frequency and size of meetings</li> </ul>	<ul style="list-style-type: none"> <li>- Existing culture</li> <li>- Desired culture</li> <li>- Experience with past change</li> <li>- Readiness for change</li> <li>- Openness to different approach</li> <li>- Sharing workspace</li> <li>- Choice and personalization</li> <li>- Wellbeing</li> </ul>	<ul style="list-style-type: none"> <li>- Likes and dislikes about current environment</li> <li>- Ideal work environment</li> <li>- Weighing the pros and cons of different approaches</li> <li>- Defining the small wins and strategies to deploy</li> <li>- Test various potential outcomes</li> </ul>

### Develop space requirements

Combine the results of the interview and focus group discussions with your programming and observational data and survey results to develop space options that meet business needs, improve workplace performance, and optimize space use. Integrate workplace strategies and key planning considerations in your project request to ensure you consider all aspects of the statewide [space use policy](#).