

MISSOURI

A stylized graphic of the letter 'E' composed of three horizontal, slightly curved bars. The top bar is green, the middle bar is blue, and the bottom bar is red. These bars are positioned to the left of the 'D' in 'DOOR', partially overlapping its vertical stem.

DOOR

Joel Walters, Director  
Ken Zellers, COO

# Organizational Health Index

MSATA 2018

MISSOURI DEPARTMENT OF  
**REVENUE** 

- **Organizational Health Index (OHI) Survey Request**
- **Survey Results**
- **Nominations for Work Groups & Next Steps**
- **Work Group Presentations**
- **Successes (Implemented Initiatives)**
- **Work Group Status Updates**
- **Learnings**

## What is the OHI?

The Organizational Health Index (OHI) is an important survey tool used by organizations, governments, companies, and nonprofits around the world. By gathering this valuable information, it allows entities to understand their strengths and identify areas for improvement.



# Initial and follow-up e-mails regarding OHI survey were received from Governor's office.



July 19, 2017

Dear Colleagues,

Serving as your Governor has been the best and most rewarding experience of my life. I am impressed not only by what all of you accomplish but also how you are trying to make things work better. It is the time to submit suggestions for how we can improve to get better results.

Any team can be stronger, and a team gets stronger when they work together. That is why I am asking you – and 10,000s of your colleagues – to complete a survey that will help us improve our government. This includes identifying strengths and obstacles standing in the way of greater success.

This survey, called an Organizational Health Index (OHI), has been used by thousands of other companies, and nonprofits. I like this because it works where we can improve in comparison to others. It has been used across our state government before, and I can't wait to make progress.

Here is what I ask of you:

Please make the time for the survey. It will take a few minutes, but you may want to take longer. Your leaders are committed to your success. Please be honest and thoughtful in completing the survey. Please complete the survey by 5:00 pm on August 1st. Here is what you can expect from me and the leadership team: You have my personal assurance that this survey is confidential. Your responses will remain anonymous. You will not be asked to identify any individual.

The survey link is safe and secure. The survey site will be available in late August to review the initial findings and begin implementation in a few years.

We will use the results of this survey. I already schedule time in late August to review the initial findings and begin implementation in a few years.

I look forward to hearing from you. Here is the link to the survey: <https://ohi-survey.com/wix/p49609497.aspx>

Yours in service,



Eric R. Greitens

July 31, 2017

Dear Colleagues,

I wanted to follow up with you on my request on July 19th to participate in our first survey of the State of Missouri's workforce. This is an important opportunity to share your perspectives on how we work together in our 16 executive departments.

I am excited to share that as of this morning, the majority of you – in fact, over two thirds of you – have completed the survey. Your energy is inspiring. Nine of 16 departments already have reached over 75% participation, with the Department of Economic Development setting the bar at a remarkable 90% participation level!

If you have already participated, thank you for investing your time and helping us understand how we work together in our government.

If you have not taken the survey yet, I hope that you will before we close the survey on the evening of Tuesday, August 1st (tomorrow). We want your voice to be heard. The survey is confidential. It is worth the 25-30 minutes.

If you have any trouble accessing the survey site or other technical issues, please contact your department's IT office so they can work to resolve any issues. If you have specific questions or concerns as you begin completing the survey, please reach out to your designated HR contact.

As a reminder, here is the link to the survey: <https://ohi-survey.com/wix/p49609497.aspx>

I look forward to discussing the results with all the Cabinet leaders and then working together to keep making progress in how we work together to serve the citizens of Missouri.

Yours in service,



Eric R. Greitens





MSATA 2018

OHI Survey Communication  
Director of Revenue  
July 2017

## Survey completion request e-mail disseminated to staff

<b>Date</b>	July 13, 2017
<b>To</b>	DOR.ALL
<b>Subject</b>	Message from the Director - Organizational Survey

Dear Team,

You've heard directly from Governor Greitens over the past six months that he is focused on identifying ways to improve the way state government functions in order to provide better services for Missouri citizens. And he is also invested in working to proactively make changes and take steps to ensure our organization as a whole – me, you, and all of our co-workers – are functioning as well as we can as a team, and that we are providing a healthy, positive work environment for employees at every level at every department.

To that end, the State of Missouri has engaged McKinsey & Company (a leader in organizational health exercises) to assist us with understanding the key leadership and cultural elements that we need to build a high-performing organization.

As the initial step in our health journey, we will soon be sharing a state employee survey called the Organizational Health Index (OHI). Next week, you will receive an e-mail with a link to an online survey (and no, this is not a test from the folks over in the Cybersecurity Office). We recognize the challenge of finding time to provide your feedback, but we believe strongly that this is a vital investment for all of us. It is a priority for Governor Greitens, for me, and I hope it will be for you too. Please take 20-30 minutes to complete the survey as soon as you can. All responses will be treated with absolute confidentiality. You will not be asked to provide your name, nor will any of the questions asked within the survey be used to identify anyone.

Your participation is key; the survey is designed to be an in-depth evaluation of the way we organize and complete our work, and the findings will be used as a basis to identify changes we should consider in order to ensure we achieve our performance objectives. It will take time to turn these findings into action, but in the months ahead you will begin to hear about many of the initiatives we will undertake together to ensure our efforts can help drive our transformation goals and our organizational performance in as effective a manner as possible.

In addition, we want all employees to participate. If we reach a 90% participation rate, employees will receive casual dress days every Monday in August – in addition to the Fridays that are already designated as casual dress.

If you have any questions about the survey, please contact your supervisor and he or she can address any issues with me or our IT office as necessary. If you have other questions or concerns as you begin completing the survey, please reach out to our Personnel Office at (573) 751-1291.

Thank you in advance for your participation – I look forward to working with you to improve the way our state government operates.

Warmest regards,

Joel W. Walters

Missouri Director of Revenue  
[Joel.Walters@dor.mo.gov](mailto:Joel.Walters@dor.mo.gov)

**92% of employees  
completed the OHI  
survey**

**92%**  
Participation

*Thank You!*



The Department Town Hall meeting was held and survey results were shared with the staff.

### Organizational Health Results

91.6%  
1181 Survey Responses

The Leadership Team would like to thank all of you who participated in the Organizational Health Survey a few months ago. As you can see, your participation was great! Because of your commitment to the Department we now know we have some work to do. We are looking forward to the challenge and we hope you are too.

The survey highlighted that we have a lot to celebrate. The vast majority of you come to work every day believing in our Department and willing to go the extra mile. We also have the capabilities to achieve our mission. But the feedback you provided reinforces what we all knew: there are areas in which we need to focus and improve. Here are some that stood out.

Citizen Focus	Direction	Role Clarity	Leadership	Recognition
How can we consistently put citizens first and do "one more thing"?	Where are we going and what are our milestones?	How do we make sure every employee knows what is expected of them?	How can our leaders engage more with you on what matters?	How can we recognize superior performance every day?
How do we make citizen focus our purpose?	How do we get there?	How are we doing?	How do we inspire leaders instead of managers?	How do we create accountability and reward performance?

There is a real opportunity to focus our efforts in ways that address the themes from the OHI survey as we continue to develop a strategy and drive towards delivering on our previously identified areas of focus.

Here is our PLAN

- Create employee workgroups
- Track progress
- Improve communications

COME PREPARED TO PARTICIPATE!

Department of Revenue Town Hall Meetings  
October 19, 2017 - 8:15 a.m. or 9:30 a.m.

We Need Your Input

We need Department representatives from every division and level to contribute and design initiatives to improve how we work. Please nominate up to five co-workers you respect, trust, and feel are up to the task. The nomination process is anonymous and open until Oct. 27. Simply follow the link below to make your nominations:  
<https://mo-survey-nominate.azurewebsites.net>

Real Action, Real Results

## TOWN HALL

Oct. 19, 2017

MISSOURI DEPARTMENT OF REVENUE

Immediate focus areas were identified



Citizen Focus

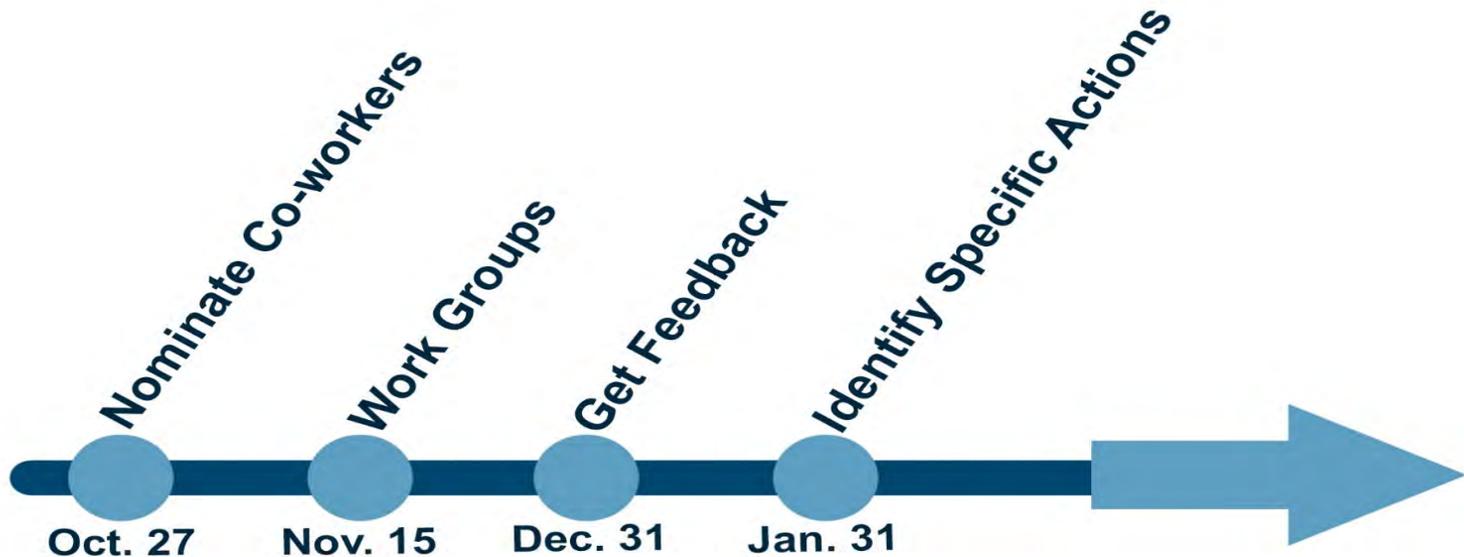
Direction

Role Clarity

Leadership

Recognition

Timeline was established to develop work groups and action plans for focus areas



**Nomination request e-mail disseminated to staff. Employees were asked to nominate up to 5 co-workers to work on OHI initiatives.**

<b>Date</b>	October 26, 2017
<b>To</b>	DOR.ALL
<b>Subject</b>	Town Hall Follow-up

The Leadership Team would like to thank everyone who attended the Town Hall meeting last week. As promised, we recorded the session for our field office staff and for employees who were unable to attend. Here is a [recorded version](#) of the Town Hall meeting. (This link has also been added to the Intranet page!)

**Just a Reminder! We are asking you to help us find Department representatives from every division and level to contribute and work towards building initiatives to improve how we work together.**

**By October 31, 2017, please nominate up to five co-workers (any job or classification) to be considered for working groups and to provide input to achieve our goals. The nomination process is anonymous. Simply click the link <https://mo-survey-nominate.azurewebsites.net> and then insert the email addresses (or names) of coworkers whose opinions you trust and respect. (You can also access this website by entering the address into your browser on your mobile phone, if you prefer.)**

- Nominations were received and employees receiving 4 or more nominations were assigned to work group teams.
- 10 teams were created – Group A and Group B for each of the following focus areas:
  - ❖ Citizen Focus
  - ❖ Direction
  - ❖ Role Clarity
  - ❖ Leadership
  - ❖ Recognition

together everyone  
**TEAM**  
achieves more

## Nomination letters were issued to staff



- **Team sponsors (consisting of members from the leadership team) are appointed for each work group, along with team leads.**
- **Work groups begin meeting regularly to develop recommendations**



Employee involvement teams continue to meet and gather input from across the organization, grouping ideas, sharing best practices, and develop recommendations regarding their area of focus.



## Updates for OHI work groups provided to all Department staff

**DEPARTMENT OF REVENUE  
TOWN HALL  
1.11.18**

Dear Team Member,

The Department of Revenue's next Town Hall meetings are scheduled for Thursday, Jan. 11, at 8:30 a.m. and 10 a.m.

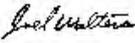
The Leadership Team is excited to announce that the agenda now includes a presentation by Drew Brdman, chief operating officer for the State of Missouri, and Office of Administration Commissioner Sarah Steelman on Engage, the new employee performance review system. Our Department is the very first state agency to hear about the new process, which will replace the PER for M system.

That being said, the agenda for Thursday's Town Hall meetings has changed and will now consist of the ENGAGE rollout, our Baseline Survey Results, an update on the OHI Work Groups and our new Dashboard.

Thank you to all those who submitted written questions and topic ideas for discussion. We will look to begin incorporating those in our next Town Hall event.

On behalf of the entire Leadership Team, we look forward to seeing you at one of tomorrow's two Town Hall meetings.

Sincerely,



Joel W. Waters



**AGENDA**

**ENGAGE**

**Baseline Survey Results**

**OHI Work Groups Update**

**Dashboard**

**Q&A**

**DEPARTMENT OF REVENUE TO TOWN HALL**




**TOWN HALL**  
Jan. 11, 2018



Next steps communication was distributed to team members of OHI work groups detailing the timeline for development of team recommendations.

January 22, 2018

**Organization Health Index (OHI) Teams**

**Next Steps**

**Current Step:**

Working groups will continue to use the month of January to collect input from across the organization, gather ideas, best practices, and develop recommendations.

**Next Steps:**

- In early February, the 10 groups may decide to join their A and B groups and formalize and prioritize their recommendations.
- In late February, each group (separately or combined) will present their recommendations in a group meeting to all employees who received two or more peer nominations for discussion and reaction.
- In early March (no later than March 07), groups will review peer feedback and make updates to their prioritized list and these recommendations will be emailed to everyone who received one vote to give them an opportunity to provide input. Feedback will be requested to be sent to a group designee.
- In mid-March, (no later than March 15) the groups will then collaborate with the full Leadership Team in a group meeting to fine-tune their recommendations and agree upon actions, responsibilities and timelines.
- Final recommendations will be presented by each group team lead or designee in a full Town Hall meeting scheduled for March 29.

*Progress • Next Steps • Renewal*

**Real Action,  
Real Results**



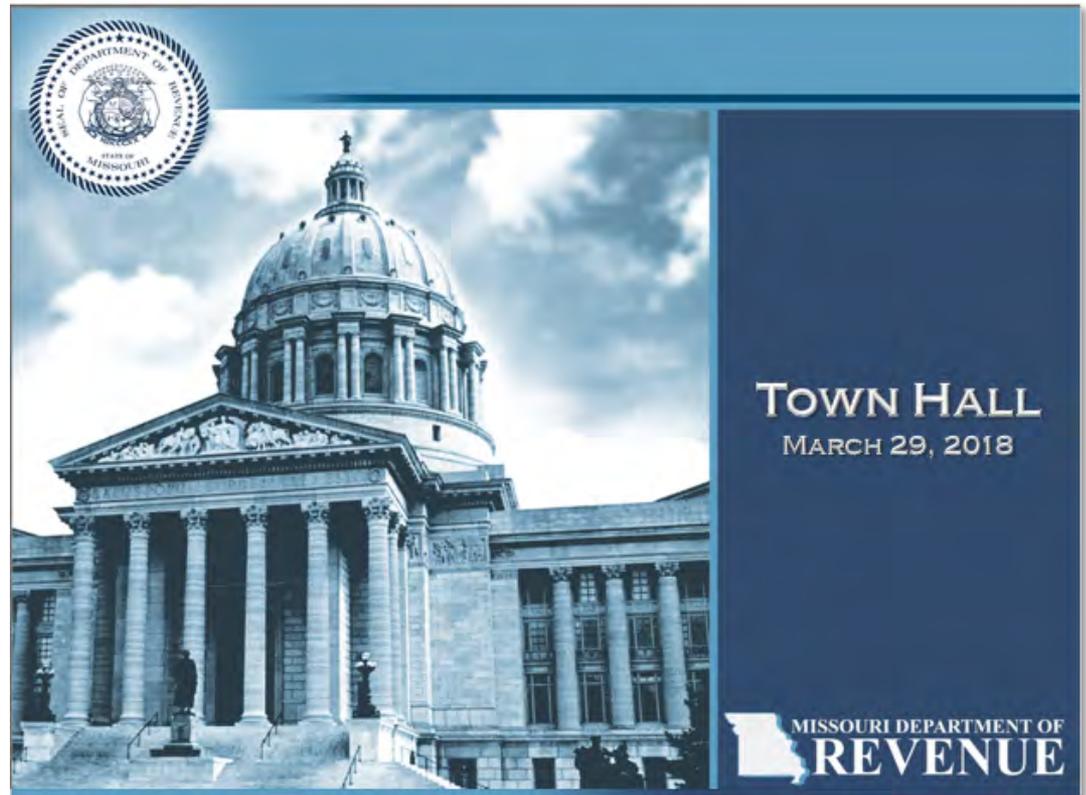
- The 10 groups decided to join their A and B groups to formalize and prioritize their recommendations.
- Work groups present recommendations to second tier nomination employees (those receiving 2 or more nominations) for feedback



- **Teams e-mailed team recommendations to everyone who received one vote to give them an opportunity to provide feedback**
- **Teams then presented recommendations to the Leadership Team**



OHI work groups present  
recommendations at Town  
Hall meeting to all  
Department staff



## OHI work groups share recommendations and respond to inquiries from staff related to their recommendations





### Re-open Tax Assistance Offices

- Citizen Focus
- 5 tax assistance offices were re-opened throughout the state



### Increased Social Media Presence

- Citizen Focus
- Expanded social media platforms to include Facebook, Instagram, and LinkedIn. Increased traffic on existing Twitter profile with strategic focus.



### Empowerment E-Mail

- Leadership
- Employees in a leadership role send weekly e-mails to their direct supervisor explaining how they empowered at least one of their team members



### “Hover” Option on Job Postings Website

- Citizen Focus & Role Clarity
- Implemented informational hover to include detailed description of job duties, qualifications, and specific work area within the Department



### Establish Accountability

- Role Clarity
- Developed a “Helpful Tips” flyer to assist employees in defining their role



### Tours of Employee’s Specific Role

- Role Clarity
- New employees are given a tour of the workflow as it relates to their specific position



### Storyboards

- Role Clarity
- Work areas display their achievements, metrics, department strategy, successes and organizational fit



### Personnel to Review Applications and Qualifications

- Leadership
- Process implemented to screen potential candidates to ensure they meet the position qualifications



### Registration of Interest Form

- Leadership
- Created form for employees who are interested in developing their skills for potential advancement opportunities



### Lunch 'n Learn Sessions

- Leadership
- Monthly seminars presented by leadership to inform staff on important initiatives and developments



### Employee Appreciation

- Recognition
- Organized a week of activities and giveaways



### Department of Revenue Award (DORA)

- Recognition
- Developed certificates to present monthly (staff are nominated by peers)



### Updated Promotion Structure

- Recognition
- Updated promotion structure to include standardized criteria, allowing for consistency in application throughout department



### Kudos Cards

- Recognition
- Created thank you cards that employees can give to one another at their discretion to show appreciation

- Teams continue to help implement approved recommendations
- Thank You letters were issued to team members for their participation



- All work group recommendations are shared on the Department's Intranet
- Staff can view real time updates for initiatives, including status and implementation



- Publicize survey; high participation creates credibility
- Be transparent, including good and bad messages
- Focus on a few areas you can make progress on rather than everything
- Keep communicating that you're listening and will act
- Engage employees at all levels to develop actions
- Continue to measure progress and communicate how you're doing
- Absolutely no retaliation, ever!
- Celebrate success



# Questions?

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