

Organizational health at the Université de Sherbrooke: Aiming for a strong and mobilized community

By Patrice Daneau, Ph.D. candidate, Business Administration, School of Management

Sasha Cardinal, Director General, Human Resources

Jocelyne Faucher, Secretary General and Vice-President, Student Life

Jean Goulet, retired (Vice-President, Human Resources)

France Myette, Associate Vice-President, Université de Sherbrooke

Denyse Rémillard, Associate President and Vice-President, Administration and Sustainable Development

Luc Sauv , Director General, Student Life



Maintaining living environments that promote health and wellbeing, in which all people have an opportunity to contribute, represents a priority against a backdrop of sweeping change in which health and wellbeing are essential to the sustainable development of organizations and society as a whole.¹ International bodies, including the World Health Organization, have been calling on post-secondary educational institutions to show leadership in the areas of prevention and health promotion by reviewing their strategic goals, revising their processes and renewing their approaches with a view to incorporating health, safety and wellbeing components into their day-to-day activities, business practices and academic mandates.²

Organizational health at the Université de Sherbrooke: Aiming for a strong and mobilized community

The 2018-2022 strategic plan adopted by the Université de Sherbrooke (UdeS), titled

Oser Transformer (Dare to Transform), sets out various objectives, including designing “enabling” work and study environments¹ and positioning the institution as a user-friendly university where people learn and work more effectively.

Spearheaded by the senior management team, a self-styled collaborative and inclusive approach was implemented to gauge the UdeS’s organizational health (OH), to call for a sharing of responsibility between all community members and to support the development of structured and needs-targeted initiatives. Taking into account past initiatives and drawing on tried-and-true metrics, such as Bhutan’s Gross National Happiness Index³ and the Canadian Index of Wellbeing,⁴ the UdeS developed its own organizational health index (OHI) made up of recognized indicators, custom-tailored *by* and *for* its community. The nature of the OHI’s ambitious challenge makes this initiative truly original because it considers the

experience of the student community and UdeS staff. In so doing, it constitutes a single health index without diluting the quality and importance of the information derived from it. The OHI thus constitutes a valuable tool to help understand lived experiences, identify priority action areas, strengthen prevention and promotion efforts in the face of today’s and tomorrow’s challenges, give managers, staff and students the means to take action in their respective environments, and appreciate the shared path toward a stronger, more mobilized community.

“Communities’ health and quality of life top the list of sustainable development principles,” says Denyse Rémillard, Associate President and Vice-President, Administration and Sustainable Development at Université de Sherbrooke. “With our Organizational Health Index, we have once again confirmed the importance of social issues in our institution’s sustainable development approach.”

A reliable index backed by a collaborative and rigorous approach

Various key milestones were achieved to ensure the rigour and relevance of efforts to make sure that the OHI reflects the UdeS's institutional values (Figure 1). Healthy collaboration between stakeholders, most notably management, partnersⁱⁱ and content experts,ⁱⁱⁱ was key to the success of each phase. Throughout the OHI initiative, participation and involvement mechanisms^{iv} were put in place at various key stages with a view to mobilizing management teams and partners, not only among staff but also among the student body.

Rally and mobilize key players with an inclusive approach

The upstream preparation stage was aimed at rallying and mobilizing key players toward implementing a collaborative and inclusive approach. A participatory management approach was taken with a view to reconciling wide-ranging interests within the community, which is regarded as complex due to the diversity of the players and sectors, all of which face different realities. A strategic committee made up of support and professional staff members, executives and management, as well as a student, was formed to support the strategic reflection process and to contribute to decision-making during the various OHI development phases.

Define "organizational health"

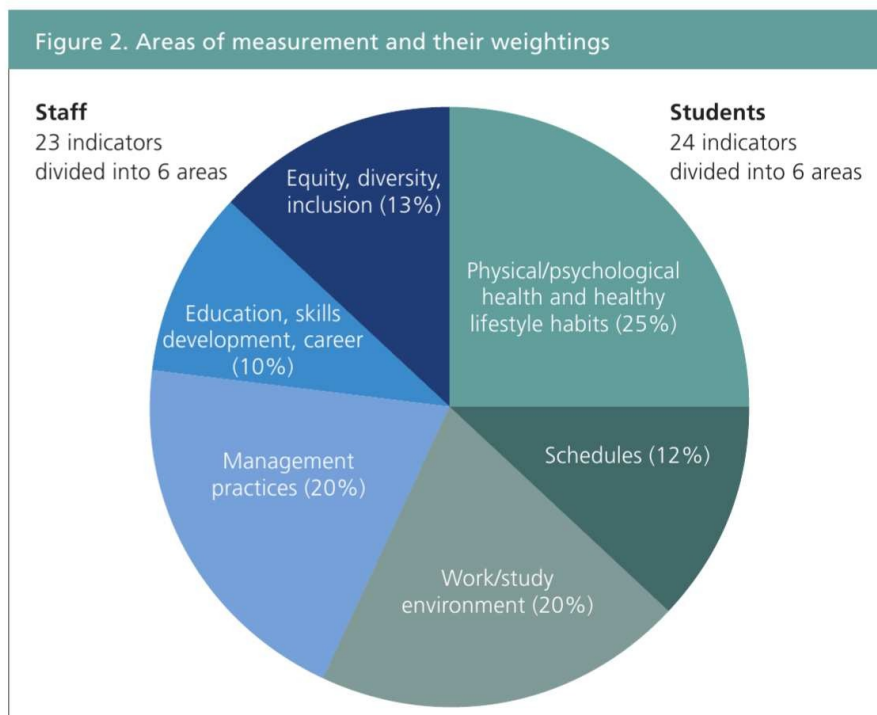
Defining what OH represents for the UdeS was the first step. This posed a unique challenge because the issue of OH encompasses multiple interests with a variety of meanings and covering numerous dimensions. In addition, no single definition led to a consensus.⁵ A more all-encompassing positive and integrated conception was prioritized: accordingly, OH is defined as a "synergy of individual (e.g., lifestyle), collective (e.g., work/study environment), organizational (e.g., management practices), and environmental (e.g., safety/security) variables contributing to the health, wellbeing, development and success of individuals and of the organization itself."⁶ Shared responsibility lies at the heart of this systemic understanding of OH.

Agree on the OHI's characteristics

A second step aimed to reach an agreement on the OHI's defining characteristics: the vision, guiding

Figure 1. Key steps during the phases of the OHI initiative

Preparation	Rally and mobilize key players
Development	Define "organizational health" (OH) Agree on the OHI's characteristics Identify and design OHI metrics Submit a request to the research ethics committee Determine the OHI's calculation formula and presentation format
Collection	Launch the questionnaire and promote participation
Analysis	Analyze the data and interpret the results Identify highlights and develop strategic goals
Action	Assimilate and disseminate the results and take action
Improvement	Redouble efforts and meet future challenges



principles, features, composition and metrics. The challenge was to design an index that sheds light on the needs of staff and students, as well as on the progress made in the area of OH over time. It was also important to ensure that the process is feasible, relevant and rigorous. A consultation exercise involving the strategic committee and various experts led to an agreement on the OHI's characteristics:

- The overall index is common to the entire community (staff and students) and may be broken down into specific sector-based indexes.
- The index can be used to track OH's evolution at UdeS over time.

- The index is multi-dimensional: it is divided into six areas (physical/psychological health and healthy lifestyle habits, schedules, management practices, work/study environment, education/career development and equity/diversity/inclusion), measured by various indicators.

- The index is made up of areas and indicators associated with various levers, on which concrete action can be taken in accordance with the principle of shared responsibility.

To ensure that the OHI sheds light on prevailing needs, an advisory group undertook a weighting exercise. The goal was to reach agreement on the weighting



of the OHI areas based on certain criteria, including capacity of action, effort versus gain, urgency of action, benefit for the greatest number and scope of action. In the end, the OHI took shape with six weighted areas in which 23 indicators are assigned to staff and 24 to students (Figure 2).

Identify and design OHI metrics

The third stage involved identifying the most reliable, valid and relevant metrics to evaluate the OHI indicators. A list of measures identified by reviewing the documentation was submitted to a committee of experienced OH experts for evaluation.⁶ To achieve a certain level of agreement between the experts, various rounds of consultation were needed to ensure that the metrics were appropriate for the selected indicators, relevant for the purposes of evaluating the OH status and tailored to the context of use.

In light of the results of that exercise, a work group developed two questionnaires: one for staff and one for students. Other groups, including the strategic committee and a pre-test group, were eventually invited to share their views on the questions' formulation, ease of understanding, clarity and order. The questionnaires were made up of some 40 questions and took approximately 20 minutes to complete.

Submit a request to the research ethics committee

Although the OHI is primarily useful for practical purposes, the longitudinal data collected over the years may have an interesting and relevant scientific scope for the occupational and organizational health research area.⁷ That is why an institutional database with potential research utility was constructed in parallel and certification was obtained from the research ethics committee.

Determine the OHI's calculation methods

A fourth key stage determined the calculation methods for evaluating the indicators, areas and overall index over time. A review of the literature was undertaken to gather information on the interpretation thresholds for each indicator, identify the comparison data and assimilate the conditions of use and interpretation of the measurement scales. The committee of OH experts was instrumental in ensuring the objectivity of the process of defining the interpretation benchmarks for the scores of each indicator and the OHI. A working group also took part in a brainstorming session examining the OHI's presentation

formats. Barometers were used to translate the digital data into a synthetic visual format to facilitate understanding of the strong points and focal points, as well as tracking over time.

Launch the questionnaire and promote participation

The fifth step involved calculating the OHI. To that end, anonymous questionnaires were administered in the fall of 2020 to all staff and students over a four-week period. A communication campaign, incentives and reminders were put in place to encourage participation in the survey. Over 33,000 people were asked to complete the questionnaire and 4,200 of them did so, working out to approximately 33% of the staff and 9% of the student body.

Analyze the data and interpret the results

The sixth step was to stabilize the OHI in order to evaluate the results. To stabilize the OHI, the distribution analysis of the first batch of data collected led to dozens of iterations to identify programming, calculation and measurement errors, and ensure the barometers were functional and the OHI behaved in accordance with the defined benchmarks. Once the data was collected, the results produced by the OHI were interpreted by a working group. The strategic committee was then able to define the institution's major strategic goals.

Identify highlights and develop strategic goals

The UdeS's overall OHI was established as 67 out of a maximum of 100 points (the staff OHI was 66, while the student OHI was 69). Even though the OHI expressed in numerical form holds out the possibility of comparison over time, the barometers associated with each indicator can be used to provide a more detailed picture of the strong points and focal points. These detailed pictures are associated with major institutional strategic goals, for which priority action areas will be developed. (For a detailed picture of the OHI: <https://www.usherbrooke.ca/decouvrir/a-propos/sante-organisationnelle/faits-saillants-et-orientations-institutionnelles/>)

Assimilate and disseminate the results and take swift action

The final steps were to disseminate the highlights to the entire community and prepare and disseminate institutional and sector-specific reports. The assimilation of the OHI results and the major strategic goals

by the units and the partners represented a crucial step forward in creating meaning, encouraging mobilization and taking swift action. The UdeS's Human Resources Division and Student Life Division put together a guidance initiative and specific tools were developed (e.g., hosting meetings, communication tools and explanatory information for the indicators) to support the managers, who played a pivotal role during this participatory process. In addition to the institutional action plan, other action plans are underway within the various units and partners, based on the needs and priorities defined with the staff and the student body. Data is to be collected every two years to evaluate the initiatives put in place. The necessary adjustments will be made based on how the current and future needs of the university community evolve.

Redouble efforts and meet future challenges

The initiative has reached the implementation and action plan monitoring stages. The OHI is scheduled to be measured again in the fall of 2022, which will provide an opportunity to appreciate the collective efforts and progress made since the fall of 2020.

The OHI is a shared work tool on which the UdeS hopes to rely. OH principles should not simply be expressed in words; they must also be translated into concrete actions by all members of the community, the management team and the teaching staff, as well as by executives, all staff members and the student body. OH is the culmination of efforts at all levels, so all members of the university community are responsible for contributing to it in their own way if progress is to be made. While efforts are ongoing, certain challenges are emerging on the horizon:

- Maintaining the level of mobilization around this shared endeavour in a context where the power of action and individual willingness vary amid a field of constraints and possibilities specific to the area in which individuals operate.
- Favouring the assimilation of results, strategic goals, action plans and changes with a view to improving organizational health.
- Implementing sector-specific action plans before the next time the OHI is measured (scheduled for the fall of 2022).
- Encouraging a bottom-up approach and personalized initiatives so they reflect the image of the communities adopting them.



- Incorporating organizational health into day-to-day activities, units' annual planning processes and management practices without generating any additional constraints.

Footnotes

- i Technical, social and organizational environments offering individuals the opportunity to develop new expertise and skills, to expand their opportunities for action, to increase their degree of control over their

tasks and operational models, thus favouring autonomy (Falzon, P. (2005). Ergonomics, knowledge development and the design of enabling environments (p. 10-12). *Humanizing Work and Work Environments HWWE - 2005 Conference*, Guwahati, India.).

- ii Partners in the initiative, such as unions, associations and UdeS student groups.
- iii For a list of the experts consulted who played an active role in the development of the OHI, please refer to <https://www.usherbrooke.ca/decouvrir/a-propos/>

[sante-organisationnelle/une-demarche-inclusive/#c141555-1](https://www.usherbrooke.ca/decouvrir/a-propos/sante-organisationnelle/une-demarche-inclusive/#c141555-1).

- iv Stakeholders were approached at various key phases via strategic and expert committees, advisory groups, pre-test groups and working groups, drawing on the expertise and experience of the members of the university community.
- v Profs. François Courcy and Luc Touchette, of the Department of Psychology (Faculty of Literature and Humanities) and the Department of Psychoeducation (Faculty of Education) respectively, Prof. Marie-Eve Major, of the Faculty of Physical Activity Sciences, together with Patrice Daneau, Ph.D. candidate in business administration (DBA) working on the topic of organizational health, contributed actively to the work of the committee, which served to support the various phases of the initiative.

FIRST ONSITE
PROPERTY RESTORATION

HERE TO HELP YOU KEEP YOUR FACILITIES STANDING STRONG.

Comprehensive solutions and professional services ranging from emergency preparedness planning to disaster recovery and reconstruction.

- ✓ **WATER & FLOOD DAMAGE**
- ✓ **FIRE & SMOKE DAMAGE**
- ✓ **COVID-19 DECONTAMINATION**
- ✓ **EMERGENCY MITIGATION & STABILIZATION**
- ✓ **LARGE LOSS RECOVERY**

THE ONLY RESTORATION PARTNER YOU'LL EVER NEED.

24/7 EMERGENCY RESPONSE LINE
877.778.6731 | FIRSTONSITE.CA

Endnotes

- ¹ ILO (2019). *Safety and Health at the Future of Work: Building on 100 years of experience* (Geneva: International Labour Organization, 2019).
- ² M. Dooris, S. Powell, D. Parkin, and A. Farrier, "Health Promoting Universities: Effective Leadership for Health, Well-Being and Sustainability," *Health Education* 121 (2021): 295-310; A. Tsouros, G. Dowding, J. Thompson, and M. Dooris, *Health Promoting Universities: Concept, Experiences and Framework for Action* (Copenhagen, Denmark: World Health Organization, 1998).
- ³ K. Ura, S. Alkire, and T. Zangmo, "Gross National Happiness and the GNH Index," in *World happiness report*, eds. J. Helliwell, R. Layard, and J. Sachs (New York, NY: Earth Institute, 2012), 108-147.
- ⁴ N. Muhajarine, R. Labonte, and B. D. Winquist, "The Canadian Index of Wellbeing: Key Findings from the Healthy Population Domain," *Canadian Journal of Public Health* 103, no. 5 (2012): 342-347.
- ⁵ P. Dubreuil, J. Dima, M-P. Boivin, F. St-Hilaire, and F. Courcy, "Santé «organisationnelle: quels défis attendent les chercheurs de demain?" *Humain et Organisation* 5, no. 1 (2019), 1-19.
- ⁶ Université de Sherbrooke (2021). Santé organisationnelle. Retrieved from: <https://www.usherbrooke.ca/decouvrir/a-propos/sante-organisationnelle>
- ⁷ T. W. Taris, ed., *Longitudinal Research in Occupational Health Psychology* (Abingdon: Routledge, 2017).