

# The Climate/Team Effectiveness Survey

Another 'Tool' for the Program Management Office Team

*Capt. Fred Hepler, USN  
Mike Kotzian  
Duane Mallicoat*

The challenges facing an acquisition Program Management Office (PMO) team are endless. With the charge to navigate an acquisition process that typically has innumerable moving parts at any one time—and all with a very thin margin of error in terms of meeting cost, schedule, performance, and affordability goals—every PMO team must be effective and adaptable across all phases of the acquisition process. Adding to this complexity is the PMO team's need to interface and coordinate with various key stakeholders and, potentially, some geographically dispersed organizational supporting sites.

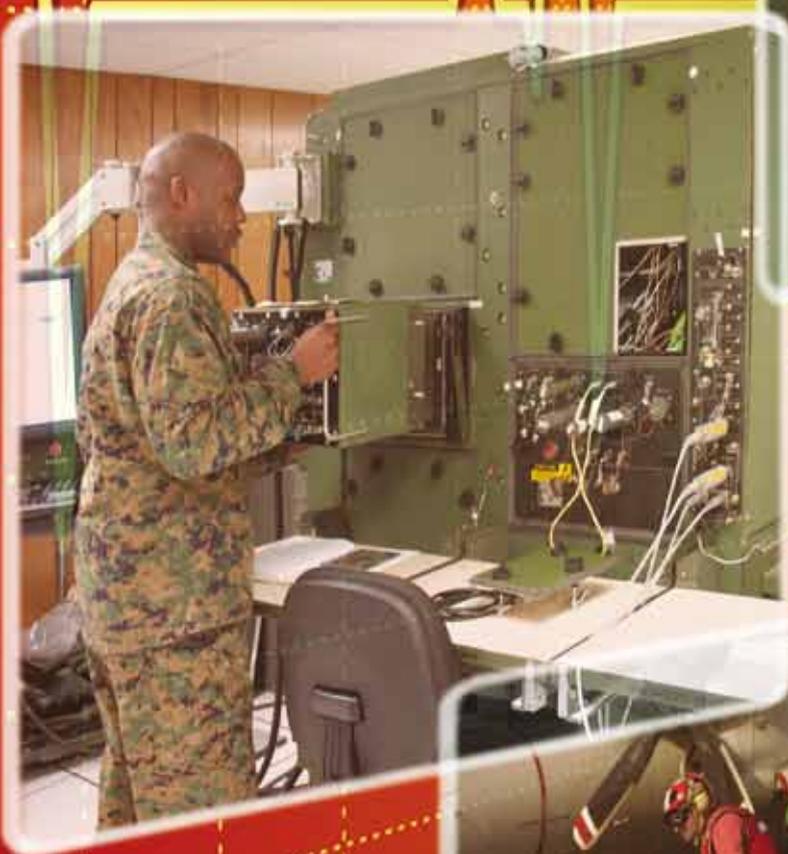
When a "new" program manager, or PM, takes command of a PMO, he or she is interested in determining just how effectively the PMO team works together while trying to identify specific "focus" areas that might need some level of dedicated leadership attention. So how does a PM and the PMO leadership team obtain fact-based information to act upon in the name of organizational improvement? By what means can the PM determine how well the organization works together and possible focus areas that might warrant attention?

## **PMA-260 PMO Overview**

The Naval Air Systems Command (NAVAIRSYSCOM) is headquartered in Patuxent River, Md. Within NAVAIRSYSCOM is the Acquisition/Program Management competency and one of many program offices is Program Manager,

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**Hepler** is the PMA-260 program manager, **Kotzian** is the DAU Mid-Atlantic Acquisition/Program Management Department chair, and **Mallicoat** is the DAU Mid-Atlantic Region associate dean for Outreach and Mission Assistance.



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Air (PMA-260), Aviation Support Equipment. PMA-260 manages the procurement, development, and fielding of Common Ground Support Equipment and Automatic Test Systems that support every Type/Model/Series (TMS) aircraft within the Naval Aviation Enterprise.

Common Ground Support Equipment (SE) includes all Platform, Armament, Weapons Control, Airframes, Propulsion, Cryogenics, Pollution Prevention, Avionics Software Loading, Vibration, Crash/Salvage, Hydraulics, Electrical Servicing, and Air Conditioning SE that support multiple systems in multiple TMS aircraft.

Common Automatic Test Systems (ATS) includes Consolidated Automated Support System (CASS), Reconfigurable Transportable CASS, electronic CASS, and associated Legacy Automatic Test Equipment (ATE) Offload to CASS Test Program Sets.

The majority of PMA-260 Integrated Product Team (IPT) members are attached to Naval Air Warfare Center Aircraft Division (NAWCAD) and Fleet Readiness Center (FRC) activities. IPT leaders will draw upon NAWCAD and FRC activities for engineering, integrated logistics support, contracting, and program management support.

Comprising 1 Acquisition Category (ACAT) II, 1 ACAT IVM and 48 Abbreviated Acquisition Programs supporting more than 3,700 aircraft with \$6.5 billion of aviation support equipment inventory, PMA-260 is the resource of choice for common support equipment solutions for the U.S. Navy and Marine Corps team.

### **Getting Started as the New PMO**

For those of us who have been around the block, experience has shown that to succeed, one must plan—and to plan effectively, one must have accurate data that can be viewed with a high level of confidence. With that in mind, there also is a school of management thought that advocates the criticality of one's first 90 to 120 days "in charge." It is in this limited window of opportunity that any leader—including a PM—can fully take advantage of the old adage "first impressions are lasting impressions." Actions—or inactions—during this period in large part set the stage for a leader's relationship with his or her organizational team. As a result, the first 90 to 120 days are key to assessing the PMO's state and identifying any potential areas that may require leadership focus.

Inspired by the May-June 2010 *Defense AT&L* magazine article, "Determining Your Organization's Health," on how climate surveys can be used to determine if an organization is operating at its full potential, Capt. Fred Hepler, the new program manager for PMA-260, decided to conduct an initial PMO assessment. Upon assuming command, Hepler asked the DAU Mid-Atlantic Team to help him conduct an organizational climate survey.

### **Creating the Survey**

The process was relatively straightforward, but required some dedicated time and attention. The first step was a little more challenging than expected: determining the desired outcomes. Hepler felt sure that a climate/team effectiveness survey would provide insights into his new command organization, but what were the specific outcomes he hoped to achieve? This part of the process required several face-to-face meetings between PMA-260 and DAU Mid-Atlantic to discuss fully and to understand what a climate/team effectiveness survey might provide, and then what Hepler wanted to achieve through the survey.

In the end, as Hepler stated, "I wanted to gain the pulse of the PMA-260 organization from 'all hands' at 'all locations' as well as their views of where the organization stood. I specifically wanted to hear the 'good' as well as the 'not so good.' I felt a properly constructed survey would help provide me with this type of information, so my leadership team could then make fact-based decisions on how to improve the organization."

Once agreement was reached regarding the desired outcomes, a draft survey was developed with suggested demographics and survey questions. With an organization comprising five major locations spread across the United States, one of the key areas for Hepler was a focus on the demographics. The goal was to create a demographic list that would allow the data to be "sorted" in order to have the capability to look at the data from various viewpoints—hence, improving the data analysis portion of the effort. However, the demographics also had to be general enough so all survey respondents had a great confidence that the survey was, in fact, "anonymous." Nothing can deter respondent honesty and openness faster than a perceived lack of anonymity.

Once the demographics were addressed, the question flow took center stage. While this step might sound fairly

straightforward, the trick was to organize the survey questions so “actionable” items resulted to provide Hepler with some hope of influencing his organization’s direction. In addition, it was considered important to add qualitative “text boxes” that would allow respondents to enter text comments to supplement the quantitative methodology used for most questions. For Hepler, this was an important feature, since “raw” qualitative comments linked to the quantitative responses from previous surveys have provided very insightful after data analysis.

Finally, Hepler relied on several qualitative questions to seek workforce feedback that could best be captured through a text-based approach: What are we doing that we should keep doing? What are we doing that we should stop doing? What are we not doing that we should start doing?

The result was a survey of 52 questions divided into five categories of interest: Demographics (eight questions), Organization (nine questions), Team Effectiveness (19 questions), Individual Satisfaction (12 questions), and Final Comments (four questions). Thirty-eight of the questions asked for a quantitative response on a scale of 1 (Strongly Disagree) to 5 (Strongly Agree). All quantitative questions had a text box in which respondents could add qualitative remarks.

When the final survey was ready, Hepler believed he had the right mix of questions and categories that would provide a clearer picture of his organization’s health and, based on the subsequent data analyses, survey results that would best steer him to potential areas of interest requiring leadership attention.

Once the survey was finalized, it went live for 30 calendar days. (A recommended “best practice” is to have the survey link go out to the PMO team via an e-mail from the PM. With a geographically dispersed organization such as PMA-260, it is important that the team know senior leadership fully supports the survey. In fact, the survey introduction emphasized how PMA-260 leadership viewed the survey as a means to “directly affect the strategic future of the organization, so please give us your most honest responses.”)

Jim Deffler, PMA-260’s NAWCAD site lead at Joint Base McGuire-Dix-Lakehurst, N.J., summed up his survey experience as follows: “With almost 40 percent of the PMA-260 workforce based at Lakehurst, N.J., I encouraged all to take the necessary time to complete the online survey and help PMA-260 to better understand the health of our organization. I wanted to follow my own advice and thoughtfully considered each question. Even as a member of PMA-260’s Executive Leadership Team [ELT], I found the anonymity to provide my candid and unedited opinions and recommendations liberating.”

### After the Survey

Hepler was not sure what to expect. Ideally, he hoped to receive sufficient data to allow the leadership team to gain

insights into the “health” of the PMO in a variety of key areas: communication, processes, leadership, and effectiveness—to name a few. Hepler wanted the view from the geographically dispersed supporting activities away from the PMO Headquarters at NAS Patuxent River, Md. He also wanted to identify the specific areas/issues that required attention at all the sites. Hepler expected more “positives” than “negatives” as PMA-260 has a very solid reputation within the NAVAIRSYSCOM community.

The results were out-briefed by the DAU Mid-Atlantic team to the entire PMA-260 ELT, allowing key managers to ask/clarify results and, as a group, discuss points that went across functional areas. The ELT out-brief soon was followed up with a full out-brief of the survey results to the entire PMO team, which was held as a video teleconference to all supporting sites. This was accomplished as a joint PMA-260 PM and DAU Mid-Atlantic brief. This approach allowed for immediate clarification of any questions, comments, clarifications regarding the process, data collected, and/or specific survey results.

### Outcomes

Once PMA-260’s ELT had the survey results, what was next?

One area immediately adopted was the scheduling of a command ELT offsite to strategize how the results could be used to improve the PMA-260 organization. (This process has been institutionalized as an ongoing PMO “best practice.”) The ELT’s basic approach was to explore “what could we do better” based on the survey results—quantitative and qualitative. After reviewing the data, and with discussions across the ELT functional areas, several initiatives were formalized as immediate outcomes.

- A minor reorganization to improve efficiency and distribution of work effort
- Changes to current organizational processes
- A revised/improved process to standardize the creation, review, and approval of related acquisition documentation to support the entire cadre of PMA-260 programs and products
- The need to grow in-house capability and competency levels in several key functional areas, initially Earned Value Management to serve as a PMO program forward-looking tool enabler

Beyond the actions of the ELT itself, a valuable outcome of the survey results showed Hepler that some within the PMA-260 workforce believed he was going to blindly “force” ACAT I program policies and procedures across the numerous programs within the PMA-260 portfolio. Hepler said he had no intention of doing so.

Once he realized the organizational concerns, Hepler proactively took steps to alleviate them. For example, he was able to inform the PMA-260 workforce that there were certain NAVAIRSYSCOM policies in place that the organization needed to

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follow. Without the survey results, it might have taken Hepler a lot longer to pick up on this workforce concern. By the time he did so, it might have been even harder to overcome this perception, to the detriment of his organization’s efficiencies.

Another valuable outcome is that the survey results revealed that many within the PMA-260 workforce were concerned about having to “blindly” adhere to the established NAVAIR-SYSCOM Systems Engineering Technical Review (SETR) process. This insight provided an opportunity for Hepler to quickly communicate his expectation that programs were expected to tailor their SETR approach to ensure the process’s intentions were met while attempting to maintain schedule—i.e., do not simply “follow the process” and accept schedule delays.

A final outcome is that the survey results helped verify Hepler’s initial thoughts about PMA-260’s “health” with fact-based information. As a whole, the organization had undergone some major changes during the 12 months preceding Hepler’s arrival. The survey results confirmed that the organization had some underlying issues that he, as the new commander, needed to address quickly.

The survey also transformed one PMA-260 senior leader from skeptic to believer.

Dennis Albrecht, PMA-260’s principal deputy program manager, summarized leadership’s thoughts regarding the survey experience: “I was initially somewhat skeptical about the benefits of a climate survey for our program team when approached with the idea of conducting one, but I was glad we did it when we were presented with the results. Although most of the feedback received was very positive, I was somewhat surprised at some of the issues and concerns that were identified in an anonymous environment, and I was motivated to take action to try and respond to some of our teammates’ concerns.”

### **Conclusion**

PMA-260 has not declared “victory” as a result of its workforce taking a climate/team effectiveness survey. Time will tell if the changes implemented as a result of the survey will realize the hoped-for return on investment and efficiency savings. However, the leaders can say the data results gave them actionable fact-based and concise information; the results gave them unhindered feedback from their program

team with a specific focus on each of the supporting sites. Hepler considered team effectiveness a vital backbone for a PMO’s success, and he believed the PMA-260 climate/team effectiveness survey process was a way to better understand this vital characteristic.

Nonetheless, while the climate/team effectiveness survey process worked for PMA-260 and allowed its ELT to grow to new levels of effectiveness and efficiency, it may not be the best option for all.

Any PMO will have dynamics if the decision is to make this journey. PMO leadership and the individual PMO team members are human. Be prepared. Everyone may not share the organization’s vision or see the climate/team effectiveness survey as beneficial and/or worth the investment. This might be a major obstacle if this is the first time the PMO has used such a tool. As you probably have guessed, Hepler received this feedback from some of the PMO team.

The individuals in a typical PMO team are proud professionals who are not necessarily excited about the prospect of reading that someone does not view areas of the PMO in the same light that they do. Therefore, it can be unsettling to have an organization take the survey and subsequently see results that might seem contradictory to leadership’s expectations or perceived notions. But this is the power of the survey: a chance to receive unhindered feedback so leadership has fact-based information from which to chart a “new” course leading to increased productivity, higher morale, more effective teamwork, and, most important, improved capabilities delivered to the warfighter.

Keith Sanders, the assistant commander for Acquisition, which has oversight of PMA-260, said climate surveys can be a powerful tool for positive organizational change.

“While conducting a climate survey isn’t novel, the leadership of PMA-260 has taken full advantage of this simple tool. They listened, learned, and reacted constructively to their team’s feedback,” Sanders said. “In this challenging acquisition environment, it’s essential that we find ways to increase alignment, productivity, and trust among our teammates—especially across dispersed geographic sites.” 

*The authors can be contacted at [fred.hepler@navy.mil](mailto:fred.hepler@navy.mil), [mike.kotzian@dau.mil](mailto:mike.kotzian@dau.mil), and [duane.mallicoat@dau.mil](mailto:duane.mallicoat@dau.mil).*