



## Review article

# Work environment assessment instruments used in nursing

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## Abstract

The aim was to identify and characterize instruments for assessing the work environment of nurses.

The sources of information were articles in six electronic databases. Prior to the search, a clinical question was constructed: “Which instruments are suitable for assessing the work environment of hospital nurses?” The query words were *practice/work environment, nursing, scale*. The search, using Boolean operators and limited to the period of 2010–2020, was performed from May to June 2020. The inclusion criteria were: empirical study, description of methods used, and an available English full text.

From a total of 1,212 identified articles, 57 were selected for the final analysis. The studies used as many as 23 instruments. The most common ones were the Practice Environment Scale – Nursing Work Index (PES-NWI) or the variants Practice Environment Scale and Nursing Work Index, followed by Brisbane Practice Environment Measure and Revised Professional Practice Environment. The work environment was assessed along with other variables such as burnout syndrome or workload.

Among the numerous instruments for monitoring the work environment, the PES-NWI was most commonly used. The instrument has also been translated into the Czech language. The study results suggest that the quality of the work environment is associated, for example, with nurses’ job satisfaction or burnout syndrome, illustrating the importance of this issue in the Czech setting.

**Keywords:** Assessment; Instrument; Nurse; Nursing; Work environment

## Introduction

The work environment may be characterized as a set of factors influencing individuals which, conversely, are co-shaped by these individuals’ activity. The work environment and its conditions are regulated by Czech legislation, namely Government Decree No. 246/2018 Coll., National Occupational Health and Safety Policy of the Czech Republic and related acts such as Act No. 258/2000 Coll., On protection of public health. The ideal work environment is one that provides conditions for physical, mental and social (or spiritual) well-being. The International Standard ISO 6385:2016 (2016) defines work environment as the physical, chemical, biological, organizational, social and cultural factors which surround a worker. The American Association of Critical-Care Nurses identified six standards for healthy work environments. These include skilled-communication, true collaboration, effective decision-making, appropriate staffing, meaningful recognition and authentic leadership (AACN, 2016). Given the nature of nurses’ work, the work environment is an important factor in their motivation to better perform their jobs. In the USA, the term *Magnet Hospitals* refers to institutions with high levels of independence and control over the work, good nurse-physician relationships, lower employee turnover rates, opportunities to take part in further

education, nurse engagement in hospital affairs, and promotion of quality patient care. These hospitals are typically able to acquire and maintain adequate staff (Walket et al., 2010). Thus a *Magnet Hospital* may be understood as a *nurse-friendly institution*.

The quality of the work environment is an important factor influencing the quality of nursing care provided – and thus requires a more detailed analysis (Cho and Han, 2018). Work environment quality is related to job satisfaction, nurse turnover, burnout syndrome and care quality (Van Bogaert et al., 2013a; Warshawsky and Havens, 2011). According to Christiansen et al. (2015), it is linked to motivation for better performance. Smith et al. (2018) point to an association between nurse incivility and unsupportive management/leadership or staffing inadequacy. Other studies showed links between the work environment and individual aspects of care provided – such as lower patient mortality (Cho et al., 2015), fewer falls (Purdy et al., 2010), fewer nosocomial infections, and fewer medication errors (Van Bogaert et al., 2014). The work environment also influences the staff’s attitude towards their own health and perception of the workload (Fagerström and Vainikainen, 2014; Tucker et al., 2010).

Work environment assessments are important indicators for hospital management and may be used in workforce planning and to predict needs regarding the nursing profession

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(Efsthathiou et al., 2018). Worldwide, a multitude of instruments are used to assess the work environment. Their authors usually focus on individual factors that have been confirmed to play an important role in shaping the work environment (Perry et al., 2018). The two most common instruments are PES-NWI and NWI-R; their use has gradually increased (Norman and Sjetne, 2017; Warshawsky and Havens, 2011). Each consists of several domains covering particular areas of the work environment.

The aim was to identify and characterize instruments for assessing the work environment of nurses.

## Materials and methods

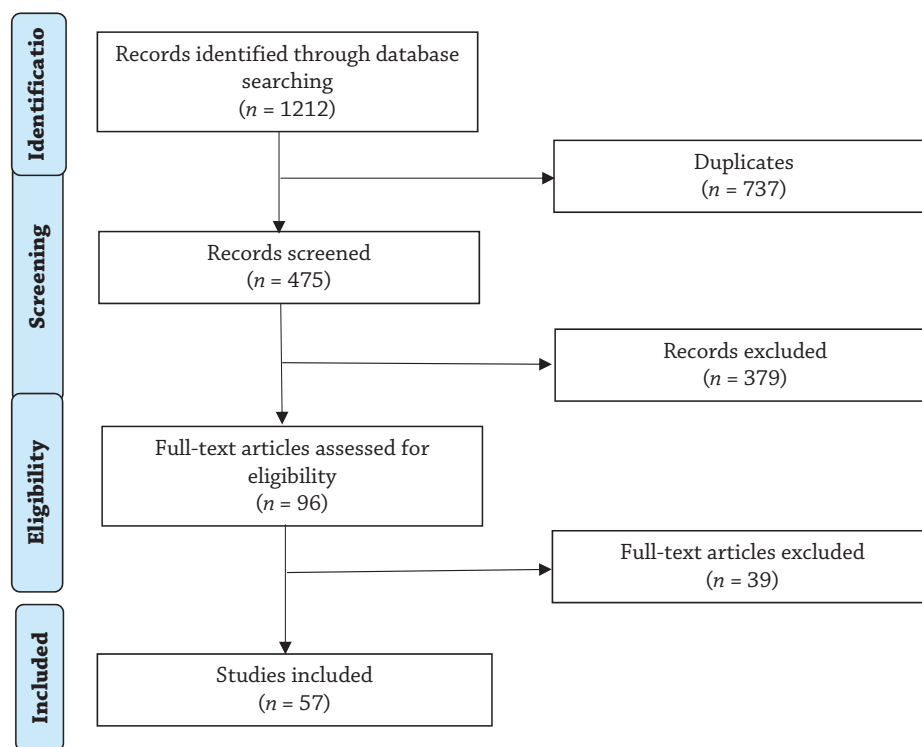
### Search strategy and selection criteria

The sources of information were articles that met the selection criteria in six electronic databases (Academic Search Complete, Academic Search Ultimate, Medline Complete, CINAHL Plus with Full Text, Science Direct, OpenAIRE). Prior to the search,

a PICO clinical question was constructed: “Which instruments (I) are suitable for assessing the work environment (O) of hospital nurses (P)?” The query words were *practice/work environment, nursing, scale*. The selected keywords were entered in a search engine using the Boolean operators AND/OR. The search was limited to the period of 2010–2020, English language and full texts of articles. The search was performed from May to June 2020. The inclusion criteria were: empirical study, use of a work environment assessment instrument, description of methods used and an available English full text.

### Article selection

From a total of 1,212 articles, 737 were excluded as duplicates. A total of 379 out of the remaining 475 articles were excluded for not meeting the search criteria (full text not available, language other than English, inconsistency with the PICO question). 96 articles were assessed for relevance based on abstract and full text. Finally, 57 articles were selected for the analysis (Fig. 1).



**Fig. 1.** PRISMA flow diagram (Klugar, 2015; Moher et al., 2009)

## Results

The identified studies suggest that the work environment is viewed from various perspectives and it has long been considered an important issue worldwide. These studies used as many as 23 instruments. The most common ones were the Practice Environment Scale – Nursing Work Index (20 studies) or the variants Practice Environment Scale (6 studies) and Nursing Work Index (9 studies). Other instruments were the Brisbane Practice Environment Measure (3 studies) and the Revised Professional Practice Environment (2 studies). In the

other cases, each instrument was used in only one study. With all instruments, higher scores mean a more positive work environment.

The work environment was assessed along with job satisfaction in 12 studies (e.g. Gasparino and Guirardello, 2017; Wang et al., 2015), with burnout syndrome in six studies (e.g. Gasparino and Guirardello, 2017; Hayes et al., 2015; Panunto and Guirardello, 2013; Van Bogaert et al., 2013b), or stress in two studies (Bratt and Felzer, 2011; Hayes et al., 2015). Other variables assessed together with the work environment were workload in two studies (Van Bogaert et al., 2013b, c), or intention to leave the current workplace in six studies

(e.g. Cortelyou-Ward et al., 2010; Nantsupawat et al., 2017). Additionally, the work environment was studied with respect to the quality of care provided in three studies (e.g. Gea-Cabale-ro et al., 2019), missed nursing care in two studies (Park et al., 2018; Silva et al., 2020), or the impact it has on patients in one study. In the Person-Centered Nursing Index, job satisfaction (18 items) and job stress (36 items) are integral components, besides the work environment (Kurjenluoma et al., 2017). If stated, the instrument's reliability was measured for both total scores and separate subscales. Cronbach's alpha was above 0.7 for total scores and most subscales. The only exceptions were the SC-IQ, RPPE, R-IWPS, QNWL, PES-NWI, NWI and Chinese PES, with some studies showing Cronbach's alpha below 0.7 for some of their subscales. The greatest proportion of studies (35) were conducted in clinical departments of both public and private hospitals (e.g. Tang and Idris, 2016) of various sizes (e.g. Pires et al., 2018). Some studies focused on particular types of departments such as emergency departments (e.g. Schadewaldt et al., 2019) or intensive care units. Four studies were concerned with primary care (e.g. Gea-Cabale-ro et al., 2019), three studied the work environment in military hospitals (e.g. Swiger et al., 2017), and two in nursing homes (e.g. Wang et al., 2015). The numbers of items vary considerably between different instruments. The fewest items (less than 10) are in the REAL, PPEAS and Evidence-Based Work Environment Scale. By contrast, the greatest numbers of items (more than 50) are contained in the ACT, EOMII and Modified 6-D Scale of Nursing Performance. If specified, respondents rate their answers on a Likert scale (4 to 10 points); only one study uses a faces scale. In any case, those are self-report instruments (Suppl. Table 1).

The literature search has shown that, as a basic instrument, the NWI inspired the development of many others. The NWI was created by Kramer and Hafner in 1989, following research carried out in well-staffed hospitals (so-called *Magnet Hospitals*) in the 1980s. It originally consisted of 65 items (4 domains) that lacked empirical verification and were rather numerous for users (Lake, 2002). The authors also used the instrument in the military setting, with items being divided into five domains without additional explanation (Estabrooks et al., 2002). Later, the 65 items were adapted to 57 items (55 original and two new ones) in three domains. Out of those, 15 items were selected to create the Nursing Work Index-Revised (NWI-R) with the following three domains: Autonomy (5 items), Control over the Work Environment/Practice Settings (7 items), and Relationships with Physicians (3 items). Another domain (Organizational Support) comprised 10 items from the previous domains. The remaining items are concerned with department and hospital outcomes (Aiken and Patrician, 2000; Lake, 2007). In a study by Slater and McCormack (2007), the NWI was subjected to factor analysis; as a result, the original 15 NWI items were divided into three domains (Adequate Staff and Support, Doctor-Nurse Relationship, Nursing Management) instead of four. Estabrooks et al. (2002) developed the Practice Environment Index (PEI) based on the NWI, containing 49 NWI items and two items reflecting the Canadian setting (Oshodi et al., 2017). Its abridged version containing 26 items is recommended by the author for monitoring nurses' work environment (Estabrooks et al., 2002). Following revision of the NWI, Lake (2002) created the Practice Environment Scale (PES) by selecting 48 out of the original 65 items to be tested. Eventually, 31 items were selected and divided into five domains. The instrument is referred to as the Practice Environment Scale or, alternatively, as the Practice Environment Scale-Nursing Work Index. Choi

et al. (2004) studied 57 NWI items to select 42 which were divided into seven subscales/domains (Professional Practice, Nursing Management, Staffing and Resources Adequacy, Nursing Process, Nurses-Physician Collaboration, Nursing Competence, Positive Scheduling Climate). The instrument is called Perceived Nursing Work Environment (PNWE). Slater et al. (2010) revised the NWI and identified 33 items in six domains (Career Opportunities/Advancement, Nursing Process, Nurse Participation, Adequate Staff and Resources, Collaborative Working with Doctors, Nurse Management), renaming two original domains (Control over Practice to Adequate Staff and Resources, Autonomy to Nurse Management). Other instruments derived from the NWI are, for example, the EOM-II (Oshodi et al., 2017), C-NPES (Chiang and Lin, 2009), and C-PNWE (Choi et al., 2004).

The most commonly used instrument is the PES-NWI developed by Eileen T. Lake based on the NWI. Its 31 items are classified into five subscales (Nurse Participation in Hospital Affairs, Nursing Foundations for Quality of Care, Nurse Manager Ability, Leadership and Support of Nurses, Staffing and Resource Adequacy, Collegial Nurse-Physician Relations). Each of them contains 3–10 items. The domains Nurse Participation in Hospital Affairs and Nursing Foundations for Quality of Care are indicators of the work environment in the hospital as a whole, while the other three domains reflect the work environment in particular departments (Lake, 2002). After the mean score is calculated for each domain, the work environment is classified as favorable (a mean score above 2.5 in at least four subscales), mixed (a mean score above 2.5 in two or three subscales) or poor (a mean score above 2.5 in one or no subscale) (Lake and Friese, 2006). Shorter versions of the instrument are targeted at specific settings, for example a 10-item Spanish version for primary care (De Pedro-Gómez et al., 2012) or a version for the ambulatory oncology setting containing six domains with 25 items (Friese, 2012). As can be seen from the identified studies (Suppl. Table 1), the instrument has been translated into many languages and is used in numerous countries including Australia, USA, South Africa, China, South Korea, Thailand, Turkey, Iran, Greece or Spain. It has been used in various areas of healthcare, from primary and community care, to military hospitals or nursing homes, to oncology outpatient care. To a certain extent, the results may be generalized but specific characteristics of different settings need to be taken into account.

## Discussion

The vast number of original articles underline the fact that the work environment of nurses is a topical and global issue. That is why so many assessment instruments have been created. The basic instrument appears to be the NWI which has inspired the development of many others, depending on their authors' specific perspectives. Swiger et al. (2017) recommend the use of the PES-NWI, mainly for its good psychometric properties, high discriminatory power and ability to compare results between studies (as well as within various countries). It is the number of studies using a particular instrument that may be one of the factors influencing instrument selection. Additionally, the PES-NWI was identified as sensitive for monitoring nurses' work environment by the National Quality Forum (NQF, 2004). On the other hand, some of the criticisms are that its items were formulated in the 1980s and for inpatient facilities (Friese, 2012). The wording has been updated and the instrument has been adapted for use in other settings (e.g.





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**Supplementary material****Suppl. Table 1. Descriptions of work environment assessment instruments**

Instrument name, author, abbreviation / number of studies identified	Study author, year	Number of items	Domains/subscales	Response format	Reliability ( $\alpha$ )
Alberta Context Tool (Estabrooks et al., 2009) ACT / 1	Schadewaldt et al. (2019)	56	Leadership; Culture; Feedback processes; Connections; Formal interactions; Informal interactions; Structural and electronic resources; Staffing; Time; Space	LS 5	0.45–0.90 (S)
Brisbane Practice Environment Measure (Webster et al., 2009) B-PEM / 3	Hayes et al. (2015)	26	PD; Getting things done; Flexibility in management support; Feeling valued	Not stated	0.91 (TS) 0.80–0.86 (S)
	Flint et al. (2010)				0.94 (TS) 0.81–0.87 (S)
	Reid et al. (2015)	28	PD; Management Support; Rostering; Out of depth; Workloads	LS 5	0.94 (TS) 0.66–0.89 (S)
Control Over Nursing Practice Scale (Gerber et al., 1990) CONP-S / 1	Ispir and Duygulu (2017)	23	Not specified (1)	LS 7	0.94 0.76
Essentials of Magnetism II scale (Kramer and Hafner, 1989) EOMII / 1	Oshodi et al. (2017)	58	Ward manager support; Working as a team; Concern for patients; Organisational A; Constraints on nursing practice	LS 4	0.76–0.94
Evidence-Based Work Environment Scale (Pryse et al., 2014) – / 1	Pryse et al. (2014)	8	EBP WE Scale EBP Nursing Leadership Scale		0.86 0.96
Hall's Professionalism Scale (Hall, 1968; Snizek, 1972) HPS / 1	Rabie (2019)	25	A; Using a professional organisation as major referent; Belief in public services; Belief in self-regulation; Sense of calling to the field	LS 5	0.86 0.79
Healthy Work Environment Assessment Tool (American association of Critical Care Nurses) HWEAT / 1	Monroe et al. (2020)	18	Skilled communication, true collaboration, effective decision-making, appropriate staffing, meaningful recognition, authentic leadership	LS 3	0.8 or higher
Chinese version of Perceived Nursing Work Environment (Choi et al., 2004) C-PNWE / 1	Zhao et al. (2013)	41	SRA; Professional practice; Nursing management; Nursing Process; Nurse/Physician collaboration; Nursing competence and work system	LS 4	0.96 (TS) 0.79–0.93 (S)
Leadership Environment Scale (Ross et al., 2018) LENS / 1	Ross et al. (2018)	16	Self-organisation; Agents; Shared power and decision making; Emergence; Transformative Exchanges; Different perspectives; Co-evolution		0.91 (TS) 0.86 a 0.85 (S)
Modified 6-D Scale of Nursing Performance Marshalleck, 1997); (Schwirian, 1978; – / 1	Bratt and Felzer (2011)	61	PD; Critical care; Interpersonal relations/communications; Leadership; Managing/outcomes; Planning/evaluation; Teaching/collaboration	LS 5	0.95 (TS) 0.71–0.90 (S)
Person Centered Nursing Index (Slater and McCormack, 2007) PCNI / 1	Kurjenluoma et al. (2017)	78	Stress, job satisfaction, practice environment	LS 7	0.58–0.93



**Suppl. Table 1. (continued)**

Instrument name, author, abbreviation / number of studies identified	Study author, year	Number of items	Domains/subscales	Response format	Reliability (α)
Nursing Work Index (Aiken and Patrician, 2000; Brazilian version Gasparino and Guirardello, 2011; Belgian version Van Bogaert et al., 2009) NWI / 9	Pires et al. (2018)	15	A; RDN; Control over the WE	LS 4	Not stated
	Costa et al. (2018)				Not stated
	Panunto and Guirardello (2013)		A; RDN; OS; Control over the environment		0.73–0.82 (S)
	Balsanelli and Cunha (2013)		A; RDN; OS; CP		0.811 (TS) 0.645–0.748 (S)
	Slater et al. (2010)	33	A; RDN; OS; CP		0.80–0.87 (S)
	Cortelyou-Ward et al. (2010)	57			0.947 (TS) 0.78–0.86 (S)
	Hinno et al. (2012)	35	Adequacy of resources; Supportiveness of management; Assurance of care quality via collaborative relationships		0.77–0.86
	Van Bogaert et al. (2013)	31	RDN; unit-level nurse management; hospital management-OS		Not stated
	Van Bogaert et al. (2014)				Not stated
Practice Environment Scale (Lake, 2002) PES / 5 Nursing Practice Environment Scale (Lake, 2002; Chinese version Wang, 2011) NPES / 1	Ganz and Toren (2014)	31	NPHA; NFQC; NMALSN; SRA; RDN	LS 4	Not stated
	Verulava et al. (2018)	30			
	Cheng et al. (2020)	31			0.91 (TS) 0.67–0.79 (S)
	Raju et al. (2014)				Not stated
	Gasparino and Guirardello (2017)	24			0.80–0.86
	Silva et al. (2020)				Not stated
Clinical Nursing Practice Environment Scale (Pai et al., 2011) CN-PES / 1	Pai et al. (2011)	29	Availability of safety equipment and devices; Pay and benefit; Mutual respect and support among co-workers; Support of advance in-service training; Workforce security and safety	LS 5	0.94 (TS) 0.8–0.93 (S)

**Suppl. Table 1. (continued)**

Instrument name, author, abbreviation / number of studies identified	Study author, year	Number of items	Domains/subscales	Response format	Reliability (α)
Practice Environment Scale-Nursing Work Index (Lake, 2002; Korean version Cho et al., 2011; Turkish version Türkmen et al., 2011; Spanish version De Pedro Gómez, 2012; Greek version Prezerakos et al., 2013; Australian version Parker et al., 2010; Thai version Nantsupawat et al., 2011) PES-NWI / 20	Efstathiou et al. (2018)	32	SRA; RDN; Nursing Policy; Nursing management and development; Nursing competency	LS 4	0.93 (TS) 0.71–0.94 (S)
	Cho and Han (2018)	–	NMALS; SRA; RDN		0.72–0.81 (S)
	Ulusoy and Polatkan (2016)	31	Nurses' participation and representation rate in the management; Nursing foundations needed for quality care; Nurse Managers' attitudes and leadership traits; Adequacy of staff (work force) and other resources; Communication between physicians and nurses		Not stated
	Asiret et al. (2017)		SRA; NFQC; NPHA; RDN; NMALS		0.82
	Gea-Cabalero et at. (2018)	10	Participation in management and leadership; Focus on nursing care and interdisciplinary relationships; Adequate resources	Not stated	0.82
	Wang et al. (2015)	31	SRA; NFQC; NPHA; RDN; NMALS	LS 4	0.82
	Flynn et al. (2012)		SRA; NFQC; NPHA; RDN; Supportive and Competent Nurse Manager		0.95
	Tang and Idris (2016)		SRA; NFQC; NPHA; RDN; NMALS		0.90 (TS) 0.66–0.81 (S)
	Al Sabei et al. (2020)		SRA; NFQC; NPHA; RDN; NMALS		0.98 (TS)
	Friese	25	SRA; NFQC; NPHA; RDN; NMALS; Medical assistant support	LS 5	0.80–0.90 (S)
	Gikopoulou et al. (2014)	31	SRA; NFQC; NPHA; RDN; NMALS	LS 4	0.89 (TS) 0.70–0.80 (S)
	Perry et al. (20185)	25	Supportive leadership; Staffing adequacy; Nurse-physician teamwork; Nursing care practice; Advancement opportunities		0.77–0.91 (S)
	Rabie et al. (2016)	32	SRA; NFQC; NPHA; RDN; NMALS		0.86 (TS) 0.68–0.86 (S)
	Elmi et al. (2017)	30			0.935 (TS) 0.70–0.92 (S)
	Hegney et al. (2015)	–	SRA; NFQC; NPHA; RDN; NMALS	Not stated	Not stated
	Park et al. (2018	31			Not stated
	Swiger et al. (2017)				0.96 (TS) 0.81–0.90 (S)
	Mainz et al. (2015)				0.88 (TS) 0.71–0.82 (S)
	Gea-Cabalero et at. (2019)		NPHA; RDN; Nursing merits for care quality; Leadership of coordination; Human resources		Not stated
	Nantsupawat et al. (2017)		SRA; NFQC; NPHA; RDN; NMALS		Not stated
Professional Practice Environment Assessment Scale (Siedlecki and Hixon, 2011) PPEAS / 1	Siedlecki and Hixon (2011)	13	Positive physician characteristics; Positive nurse characteristics; Collaborative decision making; Positive beliefs in the value of the nurse-physician relationship	LS 10	0.86 (TS) 0.73–0.89 (S)
Professional Practice Environment Scale (Chiang and Lin, 2008) CPPE-38 / 1	Liu et al. (2017)	38	IR and A; CP; Internal work motivation; Interpersonal interaction; Supportive leadership and handling conflict	Not stated	Not stated
Quality of Nursing Work Life Survey (Brooks, 2001) QNLW / 1	Sirin and Sokmen (2015)	35	WE; Relations with managers; Work conditions; Job perception; Support services	LS 6	0.89 (TS) 0.62–0.81 (S)
Revised Individual Workload Perception Scale (Cox et al., 2006) R-IWPS / 1	Lin et al. (2011)	24	Manager support; Peer support; Intent to stay; Workload; Unit support	LS 5	0.88 (TS) 0.61–0.85 (S)

**Suppl. Table 1. (continued)**

Instrument name, author, abbreviation / number of studies identified	Study author, year	Number of items	Domains/subscales	Response format	Reliability ( $\alpha$ )
Revised Professional Practice Environment (Erickson et al., 2009) RPPE / 2	Papastavrou et al. (2012)	39	Leadership and A; CP; Communication about Patients; Teamwork; Handling Disagreements; Staff Relationship with Physicians; Internal Work Motivation, Cultural Sensitivity	LS 4	0.84–0.93 (TS)
	Zeleníková et al. (2020)				0.89 (TS) 0.59–0.80 (S)
Chinese version Professional Practice Environment (Erickson et al., 2004) CPPE / 1	Cao et al. (2015)	38	Work motivation; CP; Interpersonal interaction; Supportive leadership and handling conflict; IR and A	LS 4	Not stated
Relative Environment Assessment Lens (Boston Children's Hospital, 2015) REAL / 1	Hinsley et al. (2016)	9	Unnamed 8	Faces scale 6	Not stated
Social Capital-Integrated Questionnaire (Jones and Woolcock, 2007) SC-IQ / 1	Sheingold and Sheingold (2013)	28	External trust; Solidarity and Empowerment; Participation and Affiliation; Internal Trust; Solidarity and Harmony; Social Cohesion with co-workers, Conflict	LS 5	0.92 (TS) 0.61–0.90 (S)

EBP – evidence-based practice; WE – work environment; TS – total score; S – subscales, A – autonomy, RDN – relationship between doctors and nurses/nursing team; IR – internal relationship; CP – control over the practice, OS – organizational support, SRA – staffing and resources adequacy, NPHA – nurse participating in hospital affairs; NFQC – nursing foundations for quality of care; NMALSN – nurse manager ability, leadership and support of nurses; PD – professional development