



APPENDIX A:

Organizational Assessment Overview

- Document handed to Change Agents to deliver to FP employees prior to distributing the Organizational Assessment
- Provides an understanding of what the Organizational Assessment is meant to do and how it relates to other program initiatives



Organizational Assessment Overview

FINANCIAL PARTNERS

<Add Business Unit>



□ Organizational Assessment

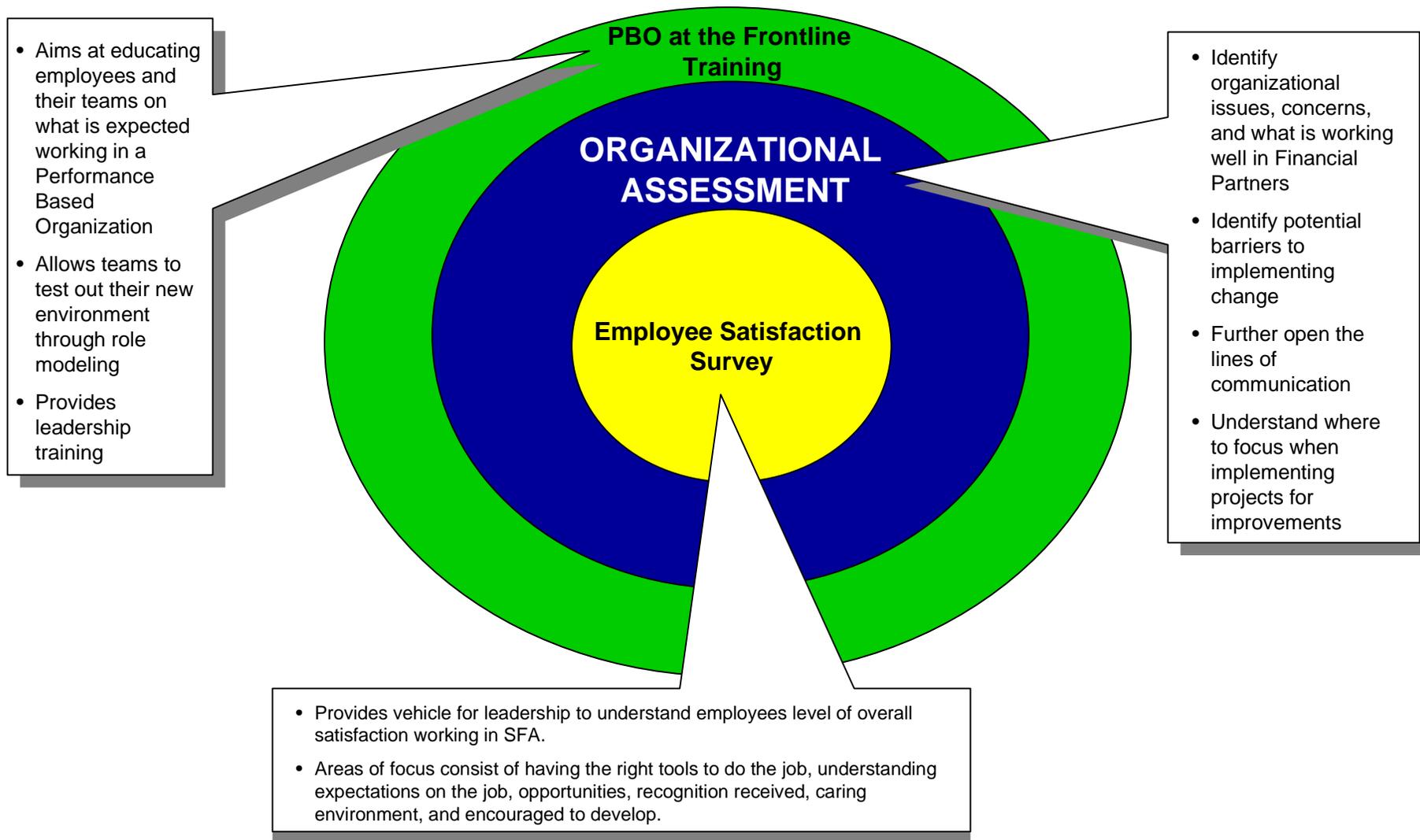
- Purpose
- Assessment Instructions
- Assessment Results

□ Next Steps

- Calendar
- Immediate Actions Steps



Organizational Assessment





Employee satisfaction is a goal of transforming the organization. To enhance our organization, we need to better understand what is working currently and what we need to improve to be successful in the future.

The Purpose of the Organizational Assessment is to:

- ❑ Identify what is working well in Financial Partners
- ❑ Identify areas for improvement
- ❑ Focus on what we should be working on
- ❑ Identify needs for future programs to address problem areas
- ❑ We all have the ability to shape our future



Organizational Assessment

By Completing the assessment you will be helping to identify ways to improve the organization.

Assessment Instructions

You will be asked to comment on a number of statements about Financial Partners. You will be asked to rate each statement according to two scales:

- ❑ **Current Situation within Financial Partners** - The extent to which you think the statement accurately portrays the organization today.
- ❑ **Importance for Future Success of Financial Partners** - The extent to which you think the statement is important to the future success of the organization.

Sample Question:

0 = Not Applicable 1 = Strongly Disagree 2 = Disagree 3 = Neutral 4 = Agree 5 = Strongly Agree

STATEMENT	CURRENT SITUATION within FINANCIAL PARTNERS	IMPORTANCE for FUTURE SUCCESS of FINANCIAL PARTNERS
organization encourages creativity in viduals.	0 - 1 - 2 - 3 - 4 - 5	0 - 1 - 2 - 3 - 4 - 5



ASSESSMENT RESULTS

- ❑ What will the assessment results tell us?
 - What is working well within Financial Partners
 - Where are areas for improvement
 - Potential barriers to implementing progress and/or success
 - Where to narrow our focus in implementing improvements

- ❑ What will we do with the assessment results?
 - Report feedback to employees within a specific timeframe
 - Identify gaps, concerns and problem areas
 - Identify opportunities to implement improvement programs

- ❑ What should I NOT expect from the assessment results?
 - Drastic change in the way we do business
 - All issues and problem areas tackled at once



NEXT STEPS

MAY		JUNE					JULY					
Week 5/15-19	Week 5/22-26	Week 5/29-6/2	Week 6/5-9	Week 6/12-16	Week 6/19-23	Week 6/26-30	Week 7/5-7	Week 7/10-14	Week 7/17-21	Week 7/24-31		
Finalize Assessment & Approach <ul style="list-style-type: none"> ✓ Provide comments and feedback ✓ Determine delivery format, i.e. take survey back to desk to complete, vs. completing it in the communication meeting ✓ Compare Employee Satisfaction Survey results to prevent duplication and determine clarity around areas of concern 		Schedule and Conduct Assessment <ul style="list-style-type: none"> • Schedule meetings • Conduct communication sessions • Administer assessment • Forward assessment to outside vendor 					Tabulate and Analyze Results <ul style="list-style-type: none"> • Tabulations are done by outside vendor and will require two weeks processing time • A report will be produced indicating findings 				Plan Improvement Programs <ul style="list-style-type: none"> • Identify programs to enhance Financial Partners 	
							Present Findings <ul style="list-style-type: none"> • Present findings and recommendations to the senior management team • Present findings and recommendations to all Change Agents • Present findings and recommendations to all Financial Partner employees 					
Communicate, Educate and Evaluate Employee Transformation												

COLOR LEGEND

- BLACK** - Indicates Change Agent's Responsibilities
- BLUE** - Indicates Contractor Responsibilities
- RED** - Indicates Future Work