

APPENDIX B:

Organizational Assessment

- Assessment distributed to all employees of the FP Channel during the months of June through August, 2000.
- Change Agents distributed the assessment along with the Organizational Assessment Overview, defining the purpose and use of this tool.

Dear Financial Partners Colleagues,

This assessment is the first step in a series of Employee Development initiatives designed to identify what is working well in Financial Partners, identify areas for improvement, and identify needs for future programs to address problem areas.

Your responses to this assessment will help identify organizational characteristics within Financial Partners that are working well today as well as opportunities to make improvements in the future. Ultimately, these improvements will enable us to serve our partners better while boosting our own job satisfaction.

Your responses will be kept confidential and the results will be tabulated by an outside contractor. Thank you for providing feedback that will improve Financial Partners.

Anna Allen Cameron Ishaq Frank Ramos Jack Reynolds Katrina Turner

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:

1. **Current Situation within Financial Partners** - The extent to which you think the statement accurately portrays the organization as it is today.
2. **Importance for Future Success of Financial Partners** - The extent to which you think the statement is important to the success of the organization, either now or in the future.

On both scales you will be asked to circle the appropriate response according to your level of agreement. See example below:

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
Our organization encourages creativity in individuals.	0 - 1 - 2 - 3 - 4 - 5	0 - 1 - 2 - 3 - 4 - 5

After completing the statement to each response, you are encouraged to provide additional comments on the section you just completed. Please use this space to share your thoughts and ideas.

The last section of the assessment asks for your opinion of what Financial Partners is doing well, what areas could use improvement, and your ideas for suggested improvement.

Your honest responses are critical to our future success. All comments are confidential!

Part 1: For each statement, please circle the appropriate response in relation to the scale depicted below.
 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
1. The atmosphere in which I work encourages me to do my best.	0 - 1 - 2 - 3 - 4 - 5	0 - 1 - 2 - 3 - 4 - 5
2. The type of work I do motivates me to come to work everyday.	0 - 1 - 2 - 3 - 4 - 5	0 - 1 - 2 - 3 - 4 - 5
3. I am motivated to contribute at my peak level of performance.	0 - 1 - 2 - 3 - 4 - 5	0 - 1 - 2 - 3 - 4 - 5
4. I am encouraged that Financial Partners is taking the time to listen to me to enhance my future success.	0 - 1 - 2 - 3 - 4 - 5	0 - 1 - 2 - 3 - 4 - 5
5. I feel I am a valuable contributor of SFA's mission to help put America through school.	0 - 1 - 2 - 3 - 4 - 5	0 - 1 - 2 - 3 - 4 - 5

COMMENTS:

Part 2:
 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
6. Information flows freely between Financial Partners business units.	0 - 1 - 2 - 3 - 4 - 5	0 - 1 - 2 - 3 - 4 - 5
7. There are mechanisms for sending information upwards and from the top down, within Financial Partners.	0 - 1 - 2 - 3 - 4 - 5	0 - 1 - 2 - 3 - 4 - 5
8. I feel informed about changes to our organization and about our future direction.	0 - 1 - 2 - 3 - 4 - 5	0 - 1 - 2 - 3 - 4 - 5
9. Receiving and providing information is important to me and helps me do my job better.	0 - 1 - 2 - 3 - 4 - 5	0 - 1 - 2 - 3 - 4 - 5
10. My front-line manager shares information with me and encourages me to do the same.	0 - 1 - 2 - 3 - 4 - 5	0 - 1 - 2 - 3 - 4 - 5

COMMENTS:

Part 3:

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
11. I feel Financial Partners listens and responds to the needs of our partners. (lenders, GAs, State Agencies, etc.)	0 - 1 - 2 - 3 - 4 - 5	0 - 1 - 2 - 3 - 4 - 5
12. I feel I understand the role of all business units within Financial Partners and how they relate to our partners.	0 - 1 - 2 - 3 - 4 - 5	0 - 1 - 2 - 3 - 4 - 5
13. I know what is expected of me in providing quality service to our partners.	0 - 1 - 2 - 3 - 4 - 5	0 - 1 - 2 - 3 - 4 - 5
14. I feel I understand how lenders, guaranty agencies, secondary markets, servicers, schools, and/or contractors support the student financial aid process.	0 - 1 - 2 - 3 - 4 - 5	0 - 1 - 2 - 3 - 4 - 5
15. I feel I understand our partners' business.	0 - 1 - 2 - 3 - 4 - 5	0 - 1 - 2 - 3 - 4 - 5

COMMENTS:

Part 4:

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
16. I feel that I can make decisions without always having to ask for approval.	0 - 1 - 2 - 3 - 4 - 5	0 - 1 - 2 - 3 - 4 - 5
17. I feel that all of the business units within Financial Partners operate well together as a team.	0 - 1 - 2 - 3 - 4 - 5	0 - 1 - 2 - 3 - 4 - 5
18. I feel Financial Partners management works well together.	0 - 1 - 2 - 3 - 4 - 5	0 - 1 - 2 - 3 - 4 - 5
19. I feel I am a valuable member of the Financial Partners team.	0 - 1 - 2 - 3 - 4 - 5	0 - 1 - 2 - 3 - 4 - 5
20. I feel comfortable sharing new ideas and taking risks.	0 - 1 - 2 - 3 - 4 - 5	0 - 1 - 2 - 3 - 4 - 5

COMMENTS:

Part 5:

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
21. The most talented and committed workers rise to the top.	0 - 1 - 2 - 3 - 4 - 5	0 - 1 - 2 - 3 - 4 - 5
22. I am encouraged and rewarded to take on more than what is expected of me.	0 - 1 - 2 - 3 - 4 - 5	0 - 1 - 2 - 3 - 4 - 5
23. When I do a good job I am recognized and rewarded. (i.e. certificate, acknowledged in front of management and peers, training, promotion, etc.)	0 - 1 - 2 - 3 - 4 - 5	0 - 1 - 2 - 3 - 4 - 5
24. I feel I have the right skills to do my job successfully.	0 - 1 - 2 - 3 - 4 - 5	0 - 1 - 2 - 3 - 4 - 5
25. I feel I am provided with the right training to do my job successfully.	0 - 1 - 2 - 3 - 4 - 5	0 - 1 - 2 - 3 - 4 - 5

COMMENTS:

Part 6:

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
26. My front-line manager is flexible and fair in his/her approach to dealing with me.	0 - 1 - 2 - 3 - 4 - 5	0 - 1 - 2 - 3 - 4 - 5
27. In my experience, Financial Partners managers are approachable and friendly.	0 - 1 - 2 - 3 - 4 - 5	0 - 1 - 2 - 3 - 4 - 5
28. My front-line manager provides feedback and support to guide me in accomplishing my work.	0 - 1 - 2 - 3 - 4 - 5	0 - 1 - 2 - 3 - 4 - 5
29. I believe that management within Financial Partners make appropriate decisions.	0 - 1 - 2 - 3 - 4 - 5	0 - 1 - 2 - 3 - 4 - 5
30. I feel Financial Partners management has developed realistic timeframes for accomplishing future goals.	0 - 1 - 2 - 3 - 4 - 5	0 - 1 - 2 - 3 - 4 - 5

COMMENTS:

Part 7: Please fill in the blank of the following:

1. List the three things you like about working in Financial Partners.

a. _____

b. _____

c. _____

2. List the three things you would most like to change in Financial Partners.

a. _____

b. _____

c. _____

3. List your ideas for how to improve what you would like to change about Financial Partners.

a. _____

b. _____

c. _____

***Thank you for completing this assessment.
You will receive the results of the assessment after the feedback has been compiled.
Your feedback is very important to Financial Partners success!***